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Exporter Guide

Japan Exporter Guide Update

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Report Highlights:
The impact of recent food safety issues, including the recent announcement of the Positive List and the resumption of trade for U.S. beef, continues to have unprecedented influence in the market. Nevertheless, opportunities continue to grow in the health, nutrition and organic food products and ingredients segments. Processed convenience food and beverages of premium quality are also promising. Prospective exporters are encouraged to follow regulatory changes in Japan's food safety system and stay up to date with reports from both the Japan Agricultural Affairs Office and the ATOs in Japan

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U.S. FOOD EXPORTER'S GUIDE TO JAPAN

Building Position in One of the World's Largest Markets for Imported Consumer Food Products

U.S. Agricultural Trade Office, American Embassy, Tokyo
U.S. Agricultural Trade Office, American Consulate-General, Osaka

2006

Originally Prepared by Promar Japan (2003) and updated by the
U.S. Agricultural Trade Offices, Japan

A Message from the U.S. Agricultural Trade Offices

Welcome to Japan, the world's largest market for imported consumer food products and the largest overseas market for U.S. food and agricultural exports! We look forward to working with you in this dynamic market.

To assist you, we at the U.S. Agricultural Trade Offices (ATOs) have prepared this Exporter's Guide, the emphasis of which is on high-value consumer foods and edible seafood products. Its objective is to provide clear, helpful information to U.S. companies that export, or plan to export, to Japan. This guide is organized into four sections and an appendix as follows:

- **Market preview**
  A brief description of the huge market opportunity that Japan represents, and how U.S. exporters may best fit within it.

- **Exporter business tips**
  Practical ideas on how to compete in this market.

- **Market sector structure and trends**
  How food products move through the distribution system to the Japanese consumer today and how these channels may change in the future.

- **Best high-value import prospects**
  Some of the hottest current import prospects in Japan.

- **Key tables and appendixes**
  Tables and charts to provide information on the Japanese food market and economy, and lists of contacts, potential customers, and other useful information.

To those exporters who are new to Japan, we believe you will find this guide invaluable as a starter kit to participation in this dynamic market. To those who are old Japan hands, we believe you may also find useful information here that you may not have previously considered.

We invite you to contact our offices in Tokyo and/or Osaka if we can assist you in building your Japanese business in any way, or if you have questions or comments on this guide.

Gambatte Kudasai!*

U.S. Agricultural Trade Offices in Japan

***Good luck (or technically in Japanese - "Do your best!")**


China
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Chugoku region
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Yokohama
Kyoto
Nagoya
Okayama
Hiroshima
Kobe
Osaka
Kita Kyusyu
Fukuoka
Matsuyama
Mt.Aso
Kanto region
Chubu region
Kinki region (Kansai)
Shikoku
PACIFIC OCEAN
Kyushu
Naha
Okinawa
Ogasawara Island

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I. Market Overview

Japan continues to represent one of the best opportunities in the world for U.S. exporters of food products. Do not be turned away by what you may have heard about recession, unemployment, closed markets, distribution problems, etc. Keep in mind Japan is an $8 billion export market for U.S. food, beverage and seafood products. The total food market in Japan valued at $600 billion for a population of 127 million compares to the U.S. food market valued at $1.038 billion for a population of nearly 298 million! If you have a quality product that meets the needs and wants of the Japanese consumer, which can be produced and delivered competitively, and you have patience to research both the differences in consumer tastes and government regulations, you can build an attractive market position in Japan.

Japan's market for high-value foods and beverages continues to change dramatically, with the latest trend being a major thrust toward functional, healthy and nutritious foods. While traditional menus and tastes still generally guide the average Japanese consumer's consumption habits, Western and other Asian ethnic cuisines are making a major impact in the market. A wide variety of Western and Asian ethnic restaurants exist along with the growing variety of consumer ready retail products in supermarkets and convenience stores.

The Japanese consumer continues to be willing to pay higher prices for quality and convenience. However, at the same time the food industry is also recognizing that a segment of consumers also demand reasonable prices in addition to quality. Consequently, the market has responded with 100-yen produce stores and other types of discount food outlets. Major national retail chains achieve differentiation by adding value through offering the Japanese consumer products with regional identity and traceability systems associated with their meat and produce. Meanwhile, third-country competitors like Australia and New Zealand have accommodated the Japanese market's desire for additional food safety assurances by offering additional certifications and traceability systems associated with some of their meat and produce exports to Japan.

The Japanese consumer's influence is continuing to have an impact on the food market in Japan. Food retailers and food service operators are competing for consumers on a number of fronts, including price, convenience, variety and safety. The recent mergers and acquisitions throughout the food distribution system that have been taking place in the past two years are in preparation to increase efficiency and improve the ability of Japanese food companies to compete for customers. This climate also has advantages for high value U.S. food and beverage exports that can answer to the needs of the Japanese food industry.

Table 1. Changes in Japanese Food Imports and Self-Sufficiency

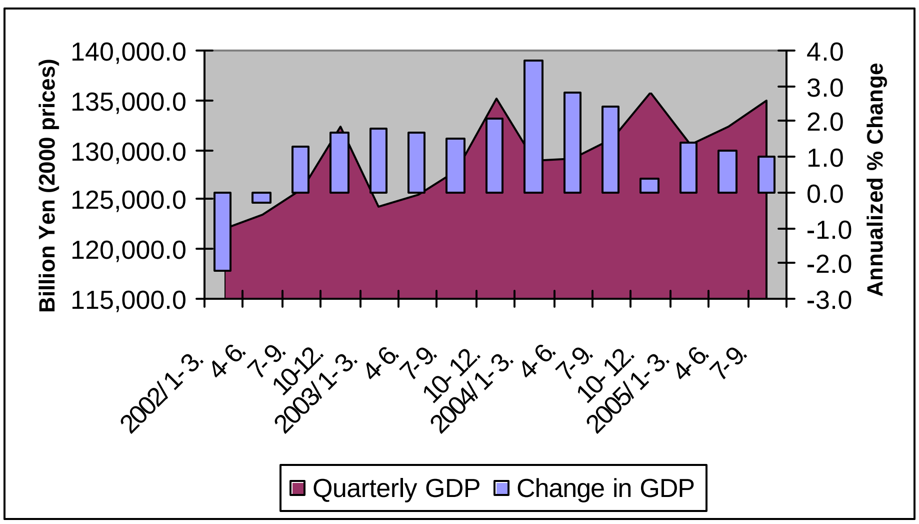
	1995	2005		Change
Food Imports	JPY bil	JPY bil	US$ bil	
Consumer-oriented food	1,914	2,563	23.27	34%
Edible seafood	1,615	1,512	13.73	-6.4%
Total consumer food	3,529	4,075	37.00	16%
Self-sufficiency Rate[1]	43%	40%		-7%

[1] Domestic food production as a share of total consumption.

Sources: World Trade Atlas; Japan Customs; Ministry of Agriculture, Forestry and Fisheries (MAFF)

While it is certainly true that Japan's Ministry of Agriculture, Forestry and Fisheries (MAFF) works actively to support the interests of Japanese farmers, since 1990, the requirements of the Japan food industry continue to rely on food imports in most categories. Meanwhile, overall Japanese agricultural production has declined. As one response, the Ministry of Agriculture is increasing the allowance of food corporations to engage in contract farming in certain locations. Nevertheless, the Ministry of Agriculture, Forestry and Fisheries reports that Japan's self-sufficiency rate stood at 40% in 2005, where it has remained unchanged for eight consecutive years.

Table 2. Japan Real Gross Domestic Product CY 2000 – CY2005/Q3



Source: Japan Cabinet Office

While sometimes sluggish, at times, Japan's economic growth exceeded projections in the past several years. Since the year 2000, Japan is exhibiting growth, although two years were very low. Calendar year GDP of 2.3 percent in 2004 was the highest growth since CY 2000. Japan's GDP grew at annualized rate of 1.0 percent in Q3 2005, largely contributed to by domestic demand, supported by increased wages and corporate investment.

Bolstered by the recovering economy, many opportunities exist for alert U.S. exporters. Just a few examples include:

- Organic and naturally prepared foods/drinks and functional foods/drinks for the increasingly health-conscious;
- Prepared precooked foods for convenience-conscious Japanese consumers;
- Products in easier-to-open containers for the rapidly growing elderly population;
- A growing market for pork;
- Food manufacturers seek quality ingredients and conveniently prepared semi-process foods that can reduce costs.

Maximum Residue Level

On May 29, 2006 Japan implemented new regulations on residues of agricultural chemicals, feed additives and veterinary drugs (hereinafter referred to as agricultural chemicals) in food. To implement the new regulation, Japan's Ministry of Health, Labor and Welfare (MHLW) announced the provisional maximum residue level (MRL) for 758 agricultural chemicals on November 29, 2005, in addition to around 10,000 existing official MRLs. Those new provisional MRLs will remain "provisional" until they are reviewed, which will take place over the next several years. After a risk assessment of a provisional MRL is completed, an official MRL can be established. Together the existing MRLs and the provisional MRLs make up the "positive list".

After the implementation date of May 29th, 2006, foods containing residues exceeding the MRL levels on the positive list are regarded as violations of the Food Sanitation Law and are rejected at the port. After two violations of a particular MRL the entire U.S. industry for that product could be subject to very strict sanctions, which usually include costly testing and lengthy delays at the port. MHLW established a uniform limit of 0.01 ppm, which is the maximum allowable limit for combinations of chemicals and commodities that have no official or provisional MRLs. MHLW also listed 15 chemicals for which no residues may be detected because of high human health risks, and 65 substances used as agricultural chemicals for exemption from the regulation. MHLW established provisional MRLs on some processed foods in addition to raw commodities but for residues in processed foods without MRLs, MHLW will use the MRLs of the raw ingredients after taking into consideration things like concentration ratios.

Other information about the positive list system, including the actual MRLs, can be found on MHLW's webpage in English at: http://www.mhlw.go.jp/english/topics/foodsafety/positivelist060228/index.html

Additional information can also be found in GAIN reports JA6004, JA6011, JA6025, JA6027, and JA6046.

Japan's Market Reopens to U.S. Beef Imports

On July 27, 2006, Japan reopened its market for U.S. beef, six and half months after it imposed a virtual import ban (a temporary import suspension) on all U.S. beef shipments due to a non-compliance case to the Export Verification Program (EV) – (See JA 6009). As of September 1, 35 facilities are approved as eligible to export beef to Japan under the EV program. About half of these facilities are believed to be currently exporting to Japan.

The initial market response to U.S. beef has been slow and is constrained by consumer anxieties, strict scrutiny at the ports, high U.S. offer prices, uncertainties about the supply of specific cuts under the EV conditions, and a "wait and see stance" by many in the food industry and trade. While bulk ocean shipments (mainly frozen) started arriving in late August, many in the meat trade predict that it will take some time for import volumes to pick up.

Additional information can also be found in GAIN reports JA6038.

U.S. Advantages and Challenges

The Japanese market offers many pluses to U.S. exporters, but it is not without difficulties. To put these opportunities in perspective, here are a few of the most important U.S. "Advantages" and "Challenges":

Table 3. Advantages and Challenges

U.S. Advantages	U.S. Challenges
• Strong yen versus weak dollar • A recovering Japanese economy • U.S. food cost/quality competitiveness • U.S. product variety - from fresh, to ingredient, to processed • Reliable supply of U.S. agricultural products • Advanced U.S. food processing technology • Positive images of American sources - such as many of the tourist destinations • Relatively low U.S. shipping costs • Science-based and transparent U.S. food safety procedures • Growing Japanese emulation of U.S. cultural and food trends • Japanese food processing industry seeking new ingredients • Japanese distribution becoming increasingly like that of U.S. • Fewer Japanese farmers • Higher Japanese farming costs • Demand for high-quality healthy and functional foods	• Increased food safety awareness (BSE, etc.), increasing demands for food quality certifications and production information • Declining price competitiveness • Distance from Japan • Consumer antipathy toward biotech foods and additives • Japanese preoccupation with quality • Consumers "prefer" Japanese products (image problem with imported food in general) • High cost of marketing • Japan's policy and actions try to increase self-sufficiency • Labeling laws that are often difficult • High duties on many products • Differences in enforcement of port inspection regulations • Increasing low-cost competition from China • Sometimes subsidized European exports • Exporters are often expected to commit to special contract requirements and long-term involvement

II. Exporter Business Tips

The following are a number of thoughts, collected from a variety of sources, on exporting food products to Japan. Some are obvious, but warrant repeating; some you may never have considered. They are organized under five topics:

- Dealing with the Japanese;
- Consumer preferences, tastes, and traditions;
- Export business reminders;
- Food standards and regulations;
- Import and inspection procedures.

We hope these suggestions will prove useful in your efforts to build food exports to Japan.

Dealing with the Japanese

Japanese business people, no matter how Western they may appear, do not always approach business relations in the same way as Americans or Europeans. Some differences are simply due to the language barrier; others are due to differences in deeply held traditions and practices. To help bridge the gaps, we suggest that you:

- Speak slowly and clearly to every Japanese, even if you know he or she speaks English.
- Use clear-cut, simple words and expressions when writing in English.
- Use e-mail and fax, rather than telephone, whenever possible.
- Make appointments as far in advance as practical.
- Carry plenty of business cards (*meishi*). Present them formally at each new introduction—and be sure they have your personal information in Japanese on the back.
- Be on time for all meetings; the Japanese are very punctual.
- Expect negotiations to require a number of meetings and probably several trips to reach agreement. Early discussions may appear less fruitful than reality.
- Be prepared for misunderstandings; use tact and patience.
- Be aware that in Japanese, "*Hai*," (yes) may mean, "I understand," not, "I agree."
- Limit the discussion of business at evening meals, or when drinking with new Japanese counterparts; these occasions are for getting to know one another and building trust.
- Be aware of major Japanese holiday and business break periods, e.g., the New Year holiday (approximately January 1-7); Golden Week, a combination of national holidays (April 29 - May 5); *Obon*, an ancestor respect period lasting for about one week in mid-August during which many companies close and business people take vacations.

Consumer Preferences, Tastes, and Traditions

These ideas may help you focus your product approach. Japanese consumers:

- Are very concerned about food safety and traceability – commonly used terms are 'Anzen' and 'Anshin' that, respectively, mean 'safety' and 'peace of mind' regarding safety;
- Place great importance on quality—producers that fail to recognize this will not succeed;
- Appreciate taste and all of its subtleties—and will pay for it;
- Are well-educated and knowledgeable about food and its many variations;
- Are highly brand-conscious—a brand with a quality image will sell;
- Care a great deal about seasonal foods and freshness—awareness and promotion of these characteristics, where appropriate, can significantly build product sales and value;
- Are increasingly health-conscious—(Witness the many TV programs about healthy food. When a product's health attributes are highlighted on such a program, it quickly sells out at the supermarkets.)
- Japan standards increasingly differ from U.S. standards; consequently, Japanese consumers will expect imports to adhere to Japanese standards, including the JAS organic standard.

Japanese consumers also:

- "Eat with their eyes" and often view food as art. A food product's aesthetic appearance—on the shelf, in the package, and on the table—is very important in building consumer acceptance.
- Have small families and homes with minimal storage space; thus, large packages are impractical.

Again, as in the United States, there are differences in regional food practices, preferences, and tastes. To illustrate, a comparison between the Kanto and Kansai regions is in the chart below.

Table 4. Examples of Differences in Japanese Regional Food Preferences

Tokyo (Kanto region)	Osaka (Kansai region)
· Somewhat less food cost-conscious	· Very food cost-conscious
· More salty foods	· Less salty foods
· More spicy products	· Less spicy products
· More Western products	· Somewhat fewer Western products
· More cuisine variety	· More traditional Japanese foods
· Prefer pork	· Prefer beef
· Prefer buckwheat *soba* noodles	· Prefer wheat *udon* noodles

Export Business Reminders

Below are some important reminders about exporting to Japan:

- Before coming to Japan, use the many sources of U.S. information, e.g., the Foreign Agricultural Service, state agricultural offices, state/regional trade organizations, and JETRO regional offices in the United States (see Appendix D).
- Build at least a minimum team within your company to help on the Japan market.
- Limit your number of trading partners, but avoid exclusive agreements with any one company.
- Use metric terms.
- Quote CIF, unless the importer requests FOB pricing.
- Price competitively; exclude U.S.-based costs, e.g., domestic sales, advertising, marketing, etc.
- Ensure that all sales documentation is correct.
- Be patient regarding requests for documentation, ingredients lists, production process, and quality assurance.
- Respond to such requests with diligence and in a timely fashion.
- Use letters of credit to reduce risk.
- Hedge export values with your U.S. bank if you are concerned about exchange rate risk.
- Set up wire transfers for payments.

Food Standards and Regulations

U.S. exporters often find Japanese food standards difficult to deal with. Here are a few tips:

- Read the Japan Food Sanitation Law, http://www.jetro.go.jp/en/market/regulations/pdf/food2004nov-e.pdf
- Read the USDA/FAS GAIN Report, Number JA6046, "Japan: Food and Agricultural Import Regulations and Standards 2006" http://www.fas.usda.gov/gainfiles/200609/146238979.pdf
  This concise document, covering food laws, labeling, packaging, import procedures, and other key regulations, should be required reading for all food exporters. It not only explains the basics, but also provides specific contact information for all the relevant import agencies. It is updated annually.
- Check JETRO* report, "Specifications and Standards for Foods, Food Additives, etc. Under the Food Sanitation Law" (http://www.jetro.go.jp/en/market/regulations/pdf/foodadd2004apr-en.pdf). This summarizes specific technical import procedures, especially for processed food products.
- Check the ATO's sector information and reports. Go to the ATO homepage (http://www.atojapan.org) and click the "Market Intelligence" menu button to get more market information and reports.

* Japan External Trade Organization; see Section on "Reports and Further Information for more about JETRO.

- Carefully check your food additive admissibility: e.g., preservatives, stabilizers, flavor enhancers. See Appendix D. in this report or the Ministry of Health, Labor and Welfare website at http://www.mhlw.go.jp/topics/yunyu/5/dl/a3.pdf.
- Ensure that the labeling you plan to use meets Japanese requirements (Food Sanitation Law).
- Verify all relevant import requirements with your Japanese customers. They will normally have the most current information on Japanese regulations.
- Provide a detailed list of product ingredients to your Japanese partners to allow them to verify their acceptability. Do not assume that U.S. approval means Japanese approval.
- For organic foods: Get your organic products approved in the U.S. under USDA's National Organic Program. Then, working with your importer, you can register your product under the Japan Agriculture Standard (JAS) before importing it into Japan. Review these documents for more information:

  NOP Export Arrangement with Japan
  (www.ams.usda.gov/nop/NOP/TradeIssues/Japan.html)
  MAFF's guide (http://www.maff.go.jp/soshiki/syokuhin/hinshitu/e_label/index.htm)
- After you have completed the above steps, check with the Agricultural Affairs Office at the U.S. Embassy in Tokyo (agtokyo@usda.gov) with any remaining questions on issues such as standards, tariffs, regulations, labeling, etc. Depending on content, the ATO's in Japan may also be able to directly respond to your inquiries.

Import and Inspection Procedures

Your job is not complete when your product has been ordered and shipped. You still must get it through Japanese customs and port inspectors. The points outlined below should aid in this process:

- Review the USDA/FAS GAIN Report, Number JA6046, "Japan: Food and Agricultural Import Regulations and Standards 2006."
  (http://www.fas.usda.gov/gainfiles/200609/146238979.pdf)
  to get a better understanding of these procedures.
- Know the specific tariffs that apply to your product before pricing to potential customers. For more information, see (www.apectariff.org).
- Remember that tariff rates in Japan are calculated on a CIF basis, and that Japan adds a 5% consumption tax to all imports.
- Do not send samples for preliminary checking without an actual request from your importer.
- Recognize that customs clearance officials' application of the law and interpretation of regulations may differ from one port to another. Thus, the least expensive or most convenient port may not be the best choice. Check with your local customer or in-country agent representative.
- Be sure to complete all documentation thoroughly and accurately.
- Sending copies of documentation in advance, especially for first-time shipments can assist your importer in getting timely release of cargo from customs and clarify matters with quarantine officials.

- For fresh products, check phytosanitary and other requirements in advance and obtain proper USDA inspections in the United States (see Appendix D, www.aphis.usda.gov; www.fsis.gov).
- Approval is regulated by the Japanese Government for biotech agricultural products and ingredients. These products will also require specific labeling to be admitted to Japan.
- Make sure you have the proper import documents accompanying shipment: 1) Import Notification; 2) Health Certifications; 3) Results of Laboratory Analysis; 4) Manufacturer's Certification showing materials, additives and manufacturing process. (Note: Products imported for the first time may require more documentation.)

III. Market Sector Structure and Trends

The exporter's single most important strategic decision—other than those dealing with the product itself—is how to position the product and get it to the Japanese consumer, i.e., through retail, food service, and/or food processing channels. Go to the FAS Reports website to see the ATO's "Food Business Line", periodic press translations on the Japan food industry and consumer trends. At the URL, http://www.fas.usda.gov/scriptsw/AttacheRep/default.asp, set your search to select Country: Japan, and Subject Text: Food Business Line.

The table below summarizes the size and growth of each market.

Table 5. Food and Drink Sales to Consumers by Major Sector in Japan

Food and Drink Sectors	**Historic Market Size and Growth 1999- 2004**					**Expected Annual Market Growth 2006 – 2010**	
	Sales			Share of Total Consumer Food Sales	1999 - 2004 Average Annual Change	Total Sector Sales Growth	Total Import Growth
	1999	2004					
	Trillion Yen	Trillion Yen	**Billion Dollars				
Retail	43.4	40.4	373	63%	-1.4%	1.0%	2.0%
*Home Meal Replacement**	*4.9*	*5.3*	*49*	*8%*	*1.6%*	8.0%	*5.0%*
HRI Food Service	27.4	24.5	223	37%	-2.2%	1.0%	2.0%
Total	70.8	64.9	596	100%	-1.7%	1.0%	2.0%
Sales of Food Processing Sectors							
Total	24.3	22.5	208	-	-1.5%	1.0%	1.0%

Sources: Food Service Industry Research Center; Ministry of Economy, Trade and Industry (METI); ATO Tokyo estimates for 2006-2010

*Because the HMR sector is included in both the retail and food service sector, figures are shown in italics.

** Exchange rate is 110.0 yen / year

Japan's food and drink sales to consumers totaled JPY 65 trillion (US$ 600 bil) in 2004; sales have declined by an average of 1.7 percent per year since 1999. Sales of food and ingredients to food manufacturers also show a slight decline, by an average of -1.5 percent annually. Retail sales make up the largest share of food sales, at 62 percent, and declines in this sector also have been small, at -1.4 percent annually. The food service sector, which accounts for 38 percent of the total, has contracted relatively more sharply—2.2 percent annually over the period. By contrast, the home meal replacement (HMR) sector is a bright spot for consumer food sales. HMR increased to 8 percent of the total market, although growth now has slowed to 1.6 percent compared to 7 percent of the market in 2002 and previously growing 7.6 percent per year from 1997 through 2002. The performance in the HMR sector contributes to sales in both the retail and food service sector.

The food and beverage industry has continued with restructuring itself to be more efficient and competitive to better respond to the demands of the average Japanese consumer (families and individuals). This is in contrast to catering to major corporations and their large receptions and large expense accounts prevalent in the past. As the ongoing mergers and acquisitions begin to take effect, the Japan food and beverage industry will also seek to decrease operational costs and rationalize its purchases in order to better answer to the Japanese consumer's needs. This effort to streamline itself will allow the Japanese food industry to compete on a global scale as well. Many larger Japanese food firms continue to position themselves for this level of competition by establishing joint investment activities overseas. Therefore, projections for this sector's recovery continue to be modest, perhaps due to the maturity of the Japanese domestic market but also due to this process of realignment in the sector. The food service sector, and particularly HMR, can see stronger growth, in line with demographic and social changes (e.g., higher consumption of precooked and premixed meal preparations as more women work outside the home; greater institutional demand for such foods as Japan's population ages, etc.). Thus, overall retail sales and sales to food manufacturers can return to moderate rates of growth. Most importantly, import growth is likely to be significantly higher in each category than for the sector as a whole.

Retail Sector

The retail sector handles 62% of the food and drink products sold to consumers in Japan.

Japan's food retail market is still fairly fragmented. Unlike North America and the EU, Japan's retail food sector is characterized by a very high percentage of general and specialty stores, including "mom-and-pop" stores, and local grocery stores. Such small retailers, however, are losing ground to larger general merchandise stores (GMS), supermarkets (SM), and convenience store (CVS) chains. These last three categories, in particular, offer excellent opportunities for U.S. food exporters, albeit with strong competition from domestic manufacturers and imports from Europe, China, and Australia/New Zealand.

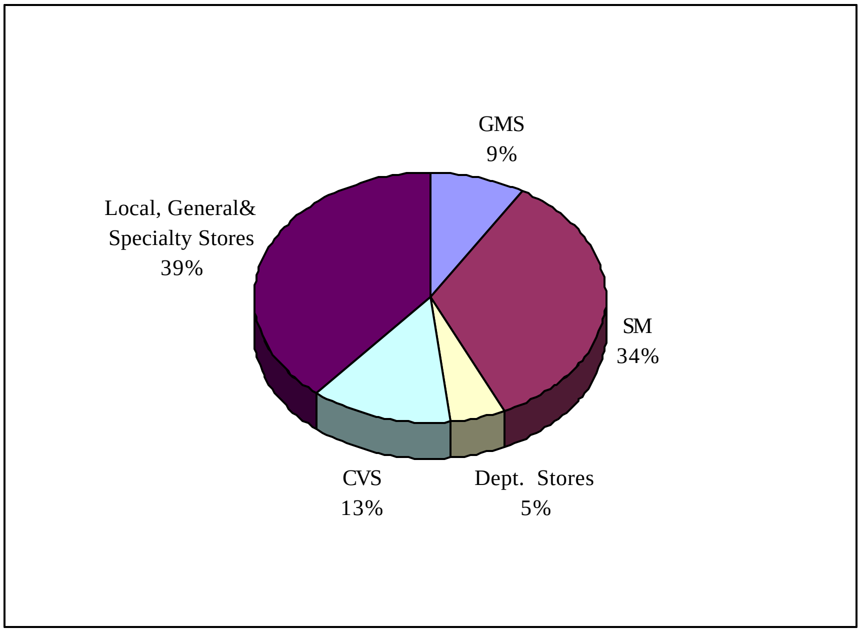
Food retailers in Japan are classified into five major sectors. The characteristics of the main retail channels are listed in the following table:

Table 6. Retail Store Opportunities for U.S. Food Exporters

	GMS General Merchandise stores	**SM** Supermarkets	**Department Stores***	**CVS** Convenience stores	**Local General and Specialty Stores**
Share (2004)	9%	34%	5%	13%	39%
Future growth expectations*	H to M	H to M	L	H to M	D
Receptivity to imports**	H to M	H to M	M	L	M
Especially good for:					
Established brands	H	H	H	M	L
High quality/high price	M	M	H	M	M
Good quality/low price	H	H	M	M	M
New products	H	H	H	H	L

*Growth expectations: H - high; M - moderate; L - low; D - decline
**Receptivity ratings: H - high; M - medium; L – low
Sources: METI Commercial Census (2004); ATO estimates on shares and import growth and receptivity.

Chart 1. Retail Food Distribution Channel



Source: METI Commercial Census (2004)

General Merchandise Stores: General merchandise stores (GMS), together with supermarkets, are often referred to as “super” in Japan. Japan’s GMS’s, like super centers in U.S., offer shoppers the convenience of one-stop shopping for groceries, perishables, clothing, household goods, furniture, and electrical goods. Food turnover typically makes up one-third of total sales at GMS’s, but are expected to become even more important for some chains.

GMS outlets accounted for 9% of food retail trade in 2004. GMS’s are operated by major national chains (Appendix A-1) that have nationwide networks with hundreds of outlets. Central purchasing is typical in these stores.

GMS’s are generally receptive to foreign products, although they often require product modification to suit market tastes and preferences. In addition, inventory risks, long lead times, and communication problems make GMS buyers hesitant to import products directly. They often purchase foreign products via trading companies. However, as Japan’s retail market becomes more competitive, and regardless of whether they source their products directly or indirectly, GMS’s offer excellent opportunities for U.S. food exporters.

Supermarkets: Supermarkets (SM) are smaller than GMS’s and specialize in food and household goods. On average, they are quite small, only a quarter the size of supermarkets in the U.S., but newer stores are larger. Stores typically generate annual turnover of about JPY 1 billion, of which perishables, readymade, bakery, and refrigerated foods account for 70% or more of total sales.

As of 2004, supermarkets handled 34% of food retail trade. Over the last 10 years, total store sales have jumped by more than 40%, while the number of stores has risen by 20%. Leading supermarkets are building larger stores, aided by declining land prices and the easing of restrictions on store size. Average retail floor space nearly doubled to 1,000 m^2 in 2004, compared to 500 m^2 - 600 m^2 in 1991.

Supermarkets face higher purchasing costs than GMS stores. They are looking for greater product and service differentiation, own-label development, and global sourcing. To achieve economies of scale, regional supermarkets are forming alliances, such as joint merchandising companies, with non-competing retailers. Thus, although individual retailers are not large enough to engage in direct offshore sourcing, through joint merchandising companies, they offer excellent opportunities for U.S. food exporters. These retailers carry imported products particularly as a means of differentiation from the national chains competing in their region.

Department stores: Department store sales have steadily declined in recent years due to growing competition from GMS's and other retailers, in addition to the recession. In 2004, the number of outlets continues to decline to 14% and total sales have fallen to 5%. Food sales at department stores have declined in tandem, and now currently account for only 5% of total food sales.

Nevertheless, department stores are an under exploited channel for many U.S. exporters (Appendix A-2). Most department stores have extensive basement concessions (i.e., small, independently operated retail stands), otherwise known as 'depachikas'. There are also outlets operated by department stores themselves, offering an opportunity for U.S. exporters to launch pilot stores or to conduct marketing trials. Department stores provide a showcase for imported, novelty, and high-end products. They thus provide excellent opportunities for U.S. exporters of high-quality and fancy foods.

Convenience stores: Convenience stores (CVS) are an extremely important sales channel in Japan. The CVS sector is quite concentrated, with the top five operators holding 90% market share. Seven-Eleven Japan, the largest CVS operator, has more than 10,000 outlets in Japan. At 13%, the share of food sales held by convenience stores continues to be larger than that of GMS's (9%), and Seven-Eleven is Japan's single largest food retailer.

The convenience stores or "conbini" in Japanese, have very limited floor space, about 100 m^2 on average, and typically stock about 3,000 products. They are well known for their high turnover and advanced inventory management. Over 90% of CVS are not owned, but franchised.

The approach of Japanese CVS's to merchandising is unique and innovative. Ready-made foods, such as boxed lunches, make up about 40% of total sales. Because there were relatively few large manufacturers of ready-made food, CVS operators developed original products in collaboration with suppliers. This "team merchandising" approach extends to branded grocery lines as well. Team merchandising has also influenced Japan's food and drink manufacturers. Currently 30–50% of sales at CVS's are original products or exclusive brands.

Convenience stores derive their competitive advantage based on high turnover and extremely efficient supply chains. Thus, short lead-time and nationwide distribution are essential in dealing with major CVS operators. While this presents a significant challenge for many overseas companies, indirect business nevertheless offers huge potential for exporters. Global sourcing, especially for ingredients and raw materials used in fast food, has become more popular. CVS operators not only work with consumer product manufacturers but also with trading firms and ingredients manufacturers. In order to differentiate themselves from their competitors, major CVS operators are constantly searching for novelty and new concepts, which offers good opportunities for US food exporters.

Local General and Specialty Stores: Predominantly, Japan's food retail trade still consists of local specialty stores and grocery shops, most of which are small, family-run operations. These retailers, however, offer limited market potential for exporters. They are served by secondary or tertiary wholesalers, which, in turn, are supplied by Japan's major wholesalers. This sector has been shrinking rapidly as the food market has become more competitive. Deregulation of liquor licensing, for example, may lead to the closure of most small liquor shops. Certain retailers located principally in the Tokyo metro market specialize in imported products and may offer the shortest path for selling imported foods at retail (particularly snacks and novelty items) unmodified for the Japanese market.

Home Meal Replacement Sector

The Home Meal Replacement (HMR) sector accounted for 8% of food sales to consumers in 2004. It also represents more than 10 percent of many retailers' total sales and is now one of the key battlegrounds for food sales in Japan. As in North America and the EU, the strong growth of HMR is one of the most important developments in the Japanese food sector in recent years. Examples of popular products in this sector are prepared foods sold at supermarkets, takeout meals sold at specialty store chain operators, and various readymade foods sold at convenience and department stores. There is thus some overlap with the channels outlined above.

In recent years, HMR sales have grown 5% to 8% annually, and the sector is a driving force in Japan's food and drink market. Demand for cheaper, more convenient, and better tasting food is expected to spur further growth in the HMR sector as the number of working women, single households and elderly rise.

Although the sector consists mostly of small regional companies, consolidation is increasing. These larger producers, in turn, supply major supermarket operators and convenience stores, and tenants in department stores. There are a number of constraints facing U.S. exporters in this sector. High-volume buyers are still relatively rare; global sourcing and direct transactions with foreign suppliers are also uncommon. In addition, relatively high turnover for menu items often makes companies hesitant about global merchandising. Nevertheless, HMRs are potentially an ideal customer for U.S. food exporters, especially those willing to meet stringent cost, quality, pre-cooking and size specifications. The major HMR producers are listed in Appendix B-4.

Overall Trends in the Retail Sector

Private branding, which appeared in the market in the past based on only a low-price strategy and failed, now has settled back into the market. Not only offering low price, private branding in Japan also places more emphasis on quality and safety assurance. Gaining in popularity, private branding is available in national chain stores, high-end urban retailers and member stores of group cooperatives.

The competition among the larger more viable segments in the retail sector, GMS, Supermarkets, Departments Stores and Convenience stores has created pressures on Japan's traditional distribution channels to adapt to retailer's needs. Generally, to remain viable these retail segments require constant attention to maintaining a large variety of products on the shelves and to be able to adjust quickly to popular consumer trends. To do this, these retailer segments can no longer depend on a distribution channel that does not quickly respond to these requirements. As a result, the GMS segment has continued the trend of increasing direct procurement from producers and/or contracted with certain wholesalers to serve as their own intermediary. In response, smaller less efficient providers in the distribution channel are in the midst of mergers or acquisitions to achieve improved economies of scale. According to a recent JETRO report:

> "Rationalizing the structure of distribution and cutting the cost of physical distribution is especially urgent for large retailers that carry a wide range of different products and need to lower operating costs, including GMSs, Supermarkets, convenience stores, home centers and chain drugstores…..As a result, wholesalers in the food, miscellaneous goods, drug and cosmetics sectors increased the size of their businesses through mergers and acquisitions and by creating corporate groups."
> (Source: *Guide to Business Opportunities in Japan (Retail, Wholesale, and Food Service Market),* Japan External Trade Organization, http://books.jetro.go.jp/en/)

HRI Food Service Sector

The Japanese food service sector accounted for approximately 38% of consumer food sales in 2004. Food service encompasses four major segments: restaurants; hotels and other accommodation facilities; bars, cafes, and coffee shops; and institutional food service companies serving schools, hospitals, and corporate facilities. The characteristics of these four segments are summarized in the following table.

Table 7. Food Service Opportunities for U.S. Food Exporters

	Restaurants	**Hotels/ Travel related**	**Bars/ Coffee shops**	**Institutional**
Share (2004)	49.3%	14.2%	21.3%	15.2%
Future growth expectations*	H	M	H	H
Receptivity to imports**	H	M	H	H
Especially good for:				
High quality/high price	H	H	L	L
Good quality/low price	H	H	H	H
New products	H	H	M	H

*Growth expectations: H-high; M-moderate; L-low; D-decline
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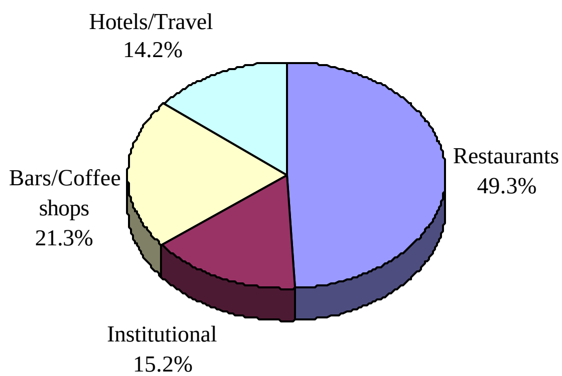
Sources: Food Service Industry Research Center (2003; ATO and Promar estimates of import growth and receptivity.

Chart 2. Food Service Distribution Channel



Source: Food Service Industry Research Center (2004)

Table 8. Share of Restaurant Sales by Type of Outlet (2004)

General restaurants	71.0%
Noodle shops	8.8%
Sushi shops	10.6%
Other	9.6%
	100.0%

Source: Food Service Industry Research Center

Restaurants: The restaurant segment offers the best export prospects for the United States among the four food service segments covered in this report. These commercial outlets generate nearly half of current food service sales. The restaurant segment comprises four main types of outlets as shown in the box above. The restaurant segment had approximately JPY 8.6 trillion (US$ 78 bil) in sales in 2004, at more than 240,000 outlets. However, as with retail, the sector is quite fragmented and most restaurant businesses are quite small, with roughly 70% outlets run by individuals or families.

building larger stores, aided by declining land prices and the easing of restrictions on store size. Average retail floor space nearly doubled to 1,000 m² in 2004, compared to 500 m² - 600 m² in 1991.

Supermarkets face higher purchasing costs than GMS stores. They are looking for greater product and service differentiation, own-label development, and global sourcing. To achieve economies of scale, regional supermarkets are forming alliances, such as joint merchandising companies, with non-competing retailers. Thus, although individual retailers are not large enough to engage in direct offshore sourcing, through joint merchandising companies, they offer excellent opportunities for U.S. food exporters. These retailers carry imported products particularly as a means of differentiation from the national chains competing in their region.

Department stores: Department store sales have steadily declined in recent years due to growing competition from GMS's and other retailers, in addition to the recession. In 2004, the number of outlets continues to decline to 14% and total sales have fallen to 5%. Food sales at department stores have declined in tandem, and now currently account for only 5% of total food sales.

Nevertheless, department stores are an under exploited channel for many U.S. exporters (Appendix A-2). Most department stores have extensive basement concessions (i.e., small, independently operated retail stands), otherwise known as 'depachikas'. There are also outlets operated by department stores themselves, offering an opportunity for U.S. exporters to launch pilot stores or to conduct marketing trials. Department stores provide a showcase for imported, novelty, and high-end products. They thus provide excellent opportunities for U.S. exporters of high-quality and fancy foods.

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Although the sector consists mostly of small regional companies, consolidation is increasing. These larger producers, in turn, supply major supermarket operators and convenience stores, and tenants in department stores. There are a number of constraints facing U.S. exporters in this sector. High-volume buyers are still relatively rare; global sourcing and direct transactions with foreign suppliers are also uncommon. In addition, relatively high turnover for menu items often makes companies hesitant about global merchandising. Nevertheless, HMRs are potentially an ideal customer for U.S. food exporters, especially those willing to meet stringent cost, quality, pre-cooking and size specifications. The major HMR producers are listed in Appendix B-4.

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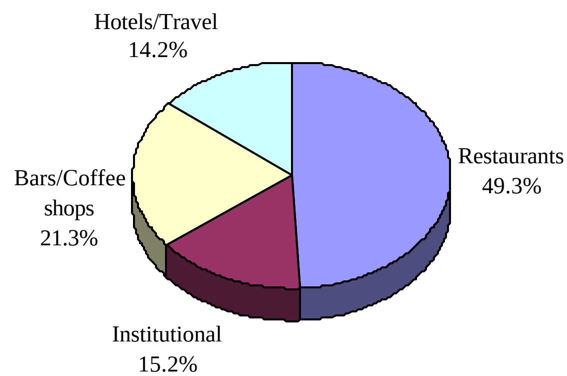

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Restaurants: The restaurant segment offers the best export prospects for the United States among the four food service segments covered in this report. These commercial outlets generate nearly half of current food service sales. The restaurant segment comprises four main types of outlets as shown in the box above. The restaurant segment had approximately JPY 8.6 trillion (US$ 78 bil) in sales in 2004, at more than 240,000 outlets. However, as with retail, the sector is quite fragmented and most restaurant businesses are quite small, with roughly 70% outlets run by individuals or families.

While restaurant sales still show a decline of 2.2 percent from 1999 through 2004, it is a declining rate, for example compared to 7% from 1997 to 2002. While overall statistics reflect a generally weak performance, larger family–style chains specialized formats are continue to show promise. Smaller family-owned restaurants have been disappearing rapidly due to increased competition from HMR, food retailers, and restaurant chain operators using the new, more specialized formats, where public relations and/or brand recognition is a key to long term success.

Several major "family restaurant" chains are increasingly important in the segment. Because they compete primarily on price, compared to their smaller rivals, they are much more active in global sourcing. These chains thus represent a significant opportunity for U.S. food exporters. Chain restaurants are particularly interested in semi-processed or precooked foods. Premixed ingredients, seasonal fruits and vegetables, specialty sauces and seasonings, and desserts are particularly attractive products for chain operators.

Japan has a large and competitive fast food segment made up of both domestic and overseas operators. Most *gyudon* (beef bowl) restaurant chains have long been big U.S. beef buyers, and they have suffered major losses from the ban on U.S. beef imports due to BSE. Generally, fast food restaurant operators are volume buyers of specific raw materials. In addition to low cost, suppliers must provide a stable supply of products at a specific quality to compete effectively in this segment.

Exporters can approach most large restaurant chains directly (Appendix B-1) but for the smaller chains, exporters must build relationships with trading companies or major food service wholesalers (Appendix A-4).

Hotels and travel related: Major hotels are attractive markets for U.S. exporters. Most hotels are chains and over 40% of their income, on average, comes from food service. Hotels, especially, are more oriented toward Western food and frequently have "food fair" promotions featuring different countries' cuisines. The exporter's challenge lies in developing effective distribution channels to reach them (Appendix B-2). Hotels offer high consumer visibility and thus promotional value for exporters. Highlighting the fact that a particular exporter's product is used by a major upscale hotel chain, for example, is a good means of promoting the product to retailers and other prospective buyers.

Railway companies and airlines operate kitchens in Tokyo and Osaka, while the overseas airlines tend to use contract caterers. These Japanese companies may tend to emphasize Japanese cuisine and thus are somewhat less receptive to imported Western products. Theme parks are also an important part of the sector. The restaurants and snack outlets at both Tokyo Disneyland and Universal Studio Theme Park, for example, draw millions of visitors every year. Other theme parks around the country also attract thousands of visitors a day.

Bars and coffee shops: These establishments account for 22% of total food service sales. Although bars have been in decline, mainly due to the recession, coffee shops—especially chain operators—continue to show significant growth. Foreign chains such as Starbucks have made significant inroads in Japan over the last few years. Both bars and coffee shops are major markets for beverages and snack foods (e.g., sandwiches, pastries).

Institutional food markets: The institutional market comprises cafeterias at factories and offices (54%); hospitals (27%); school cafeterias (13%); and welfare facilities (6%). These institutions operations are typically served by contract caterers (Appendix B-3). Building relationships with caterers is therefore essential to crack this market. Both contract caterers and institutions with their own kitchens are typically serviced by large food service wholesalers (Appendix A-4). Because the most important criterion for institutional suppliers is cost competitiveness, the sector offers huge market potential for U.S. exporters, which often enjoy significant advantages in this respect.

In line with the overall food service sector, the contract catering market has been shrinking in recent years. This is mainly due to sluggish economic conditions, characterized by corporate layoffs, consolidation of offices and factories, and cutbacks in corporate fringe benefits. Long term, however, prospects are brighter due to higher demand from contract caterers serving the hospital and social welfare segments. This growth will be driven by an aging population, reforms to the medical insurance program for the elderly, and the launch of a nursing care insurance program.

Food Processing Sector

Appendix C lists the most important food manufacturers in several food sectors. These food processors offer a number of opportunities to U.S. exporters, and they have the capacity to buy the following types of products from overseas:

- Ingredients for production in Japan;
- Finished products sold under their own labels;
- Finished products sold under the exporter's brand, but distributed through the importer's channels.

Dealing with food processors offers a number of advantages:

- They often buy in large volume;
- They have sophisticated distribution systems;
- They have a good understanding of their suppliers' businesses.

Be prepared as manufacturers are very demanding regarding the release of data on product quality, scientific data, origin of ingredients, and other related information. In large part, the trend in regulations from the Government of Japan requires manufacturers to protect themselves from risks. Such information is also increasingly important because of recent food scandals in Japan, and growing concerns about food safety and traceability among consumers. U.S. exporters must be prepared to deal positively and promptly with these issues to compete in this market.

For more information on this segment, please see the Japanese Food Processing Sector Report produced by the ATO in Osaka, Japan (http://www.fas.usda.gov/gainfiles/200504/146119454.pdf.). Also, periodically review the numerous reports from the Ag. Affairs Office for changing regulations on food additives on the FAS Attaché Reports page: http://www.fas.usda.gov/scriptsw/AttacheRep/default.asp.

Online Sales in Japan

In 2004, the value of Internet transactions by individuals and households increased by 28% to \5.64 trillion or $51.3 billion. In that total, cosmetics and health food sales combined for an increase of 44.2 percent over the previous year valued at \222 billion or $2 billion. The number of subscribers to Internet service providers in 2004 was 37.53 million.

Table 9. Japan Internet Service Providers

Rank	Company	Market Share %
1	Nifty	14.1
2	Softbank BB	12.8
3	NTT Communications	12.0
4	NEC	11.2
5	KDDI	7.6

Source: Nikkei Shimbun

Table 10. Japan Websites Selling Food Products

Company Name	Site Address
Rakuten, Natural Food Market	http://event.rakuten.co.jp/gourmet/natural/
e-Yukiseikatsu	http://www.eu-ki.com/
Metropolitan Co-op Association	http://www.oisix.com/
Daichi-o-Mamoru-Kai	http://www.pal.or.jp/group/
Radish Boya	http://www.daichi.or.jp/cgi/index.pl/
Polan Organic Foods Delivery Group	http:ww.polan.net/
Tengu Natural Foods	http://www.alishan-organic-center.com/en/tengu/shop/index.htm

Source: JETRO

Population Trends

Until recently, Japan had been experiencing steady annual population growth. It was not until the first part of this year that Japan had seen its first indication of negative population growth, when the number of deaths in the first half of 2005 outnumbered the amount of births by 31,034. Although the number of births typically tends to rebound in the latter half of the year, the Ministry of Health, Labor and Welfare (MHLW) already show Japan experiencing a natural population decline in 2005. A decline in population was not expected until 2007, coined the “Year 2007” problem, a name that came from the year in which experts originally predicted that the Japanese population would begin declining. By the year 2050 Japan’s population is predicted to be at 90 million, down from 126 million in 2000. The ratio of individuals over 65 is expected to climb from 18% to 35% respectively.

IV. Best High-Value Import Prospects

In this section, we present a list of such prospects identified as "best prospects" by the ATOs in Japan.

Best Prospects

The following presents a list of products, which at the present time we believe can be considered "best" import prospects. They were selected based on a number of criteria—high volume, demonstrated growth, and U.S. competitiveness. Other products selected are not generally available in Japan, because they fit a growing need (e.g., aging/health) or because they represent a unique concept that offers significant potential.

Table 11. Best Import Prospects

Product Category	HS code	2004 Market Size (1,000 MT)	2004 Imports (1,000 MT)	5-Yr. Avg. Annual Import Growth	Import Tariff Rate	Key Constraints to Market Development	Market Attractiveness for USA
Pork	0203	2089	864	7.6%	JPY361~482 per kg	Strong competition from Denmark and Canada in Frozen Cut Boneless. Strong demand for lower priced red meat.	Due in part to the BSE issue, demand for U.S. pork continues to grow. U.S. has advantages in short ribs, Fresh Cut Boneless. Sausage imports continue to perform well. Even with pending re-entry of U.S. beef, the market should continue to diversify with applications for pork.
Beef	0201 0202	944	643	-1%	38.5%	Single cow found with BSE in December 2003 from the State of Washington led to a 2-year long ban through December 2005 by Japan on beef imports from the United States. With a resumption of U.S. beef sales, some repair to the image of U.S. beef will be necessary. Third country competitors will continue to promote traceability.	Throughout the ban on beef from the U.S., numerous alternative protein sources are used while beef is in short supply. The quality image of U.S. beef has remained strong even during its absence from the market. Other sources led by Australia have succeeded in gaining share but cannot provide stable supplies, reasonable prices while at the same time satisfying the Japanese consumer's taste.
Natural Cheese	0406.10	106	73	6.2%	22.49%~29.8%	Tough price competition with Australia and NZ. Significant trade barriers. The lack of	The Japanese cheese market represents a growing opportunity. Imports are growing faster than domestic

Product Category	HS code	2004 Market Size (1,000 MT)	2004 Imports (1,000 MT)	5-Yr. Avg. Annual Import Growth	Import Tariff Rate	Key Constraints to Market Development	Market Attractiveness for USA
						U.S. industry understanding and no U.S. image for cheese with Japanese consumers.	production.
Snack food (excl nuts)	1905.90 2005.90.190 2106.90.294	349	126	24%	6%~34%	Extensive review of ingredients, additives and production process is usually required. Packaging may need to be revamped. Adhering to Japanese taste is also necessary.	Suppliers that can offer custom packaging and flexibility on ingredients and production process will have greater success over others. Products containing healthy, functional ingredients have strong consumer appeal.
Frozen vegetables	0710 2004	801	708	1%	6%~23.8%	Price competition from China, which is a lower cost source for raw and boiled vegetables. As quality controls improve, the "Unsafe" image of China's frozen vegetables may disappear.	U.S. is biggest supplier of frozen potato products and the market is growing rapidly. Market growth is expected along with growth of home meal replacement market.
High quality natural fruit juice	2009	827,984 KL	286,984 KL	4.8%	5.4%~29.8%	Competition from Australia, New Zealand, South Korea South Africa and Taiwan is severe. China also a major source for fruit juices.	High quality natural fruit juices are preferred by the health conscious. Fruit juice drink bars are increasing. Grapefruit juice and Orange juice have a big share.
Berries	0810.20 0810.40 0811.20	6	5	18%	6%~9.6%	Domestic consumption of berries is limited. Promotional effort is needed.	The market is growing rapidly. Domestic production is small and U.S. share is over 40%. Berries are becoming popular as "functional food".
Tree nuts	0801 0802	79	79	1%	Free~12%	Nuts not popular to be eaten alone as a snack; continued promotional efforts needed to expand uses.	Tree nut market in Japan is still relatively small and offers good growth potential. Domestic production is small. Promotions targeted at the baking industry are working well. Consumers are interested in nuts' health functionality. U.S. has largest share for almonds, walnuts, and pecans.

Product Category	HS code	2004 Market Size (1,000 MT)	2004 Imports (1,000 MT)	5-Yr. Avg. Annual Import Growth	Import Tariff Rate	Key Constraints to Market Development	Market Attractiveness for USA
Wine	2204	247,862 KL	169,415 KL	-3.2%	15% or JPY125 per liter, whichever is the less, subject to a minimum customs duty of JPY67 per liter.	A strong dollar inhibited exports during this period. More recently, the Yen began to weaken against all world currencies. Competition is strong from France and Italy, and recently from Australia and Chile especially for the JPY 1000-2000 price range.	The wine market is growing, doubling in 10 years. Wine still only 6% of total alcohol consumption; the market should grow. U.S. share has been increasing recently, and broadening beyond California.
Pet food	2309	780	448	1%	Free~JPY59.5 per kg, plus JPY6 for every 1% exceeding 10% by weight of lactose contained.	Competition from Southeast Asia, which is a lower cost source for wet cat food than the U.S. (Note: U.S. Packages are larger than those desired in Japan.)	U.S. is a low-cost supplier of dry & wet dog food and dry cat food. The trend to more highly differentiated, higher-quality value-added pet food items should help U.S. suppliers who have good technology.
Cakes, waffles, pies	1905	518	93	19%	9%~29.8%	The production process, ingredients and additives must be cleared before entry. Competition from Taiwan and Hong Kong.	Domestic consumption of bakery products is growing. Sales of waffles rising recently. U.S. share is growing due to growing popularity of cafés, including proliferation of Seattle-style coffee shops offering pastries.
Salmon	0302.12 0303.11 0303.19 0303.22	419	174	1	3.5%	Farmed salmon competition from Chile, Norway, Australia and New Zealand, employing advanced frozen food technologies to improve quality and tailoring their products to specific portion size. The market is also price sensitive.	U.S. image as supplier of wild" and "natural" salmon. Although growth during this period in quantity is currently low, value has increased substantially and the potential for wild salmon as opposed to farm-raised should find increasing acceptance with Japanese consumers. Seasonal promotion is a plus.

Product Category	HS code	2004 Market Size (1,000 MT)	2004 Imports (1,000 MT)	5-Yr. Avg. Annual Import Growth	Import Tariff Rate	Key Constraints to Market Development	Market Attractiveness for USA
Non alcoholic beverages products	2202.90 2209.00	74,862 KL	59,496 KL	27%	9.6~13.4%	Intense competition likely from a growing variety of local non alcohol beverage products.	Aside from a growing trend among younger consumers. Changes are expected in the tax law. Continued higher costs for beer and other low alcohol beverages are likely to result in continued attraction for these products.
Functional foods	-	JPY2.2 billion	-	-	See specific product category	Japan has important functional food standard requirements that must be met. For the Japanese to recognize any new beneficial aspects of food, education and promotion is necessary.	Market growing very rapidly; expanded threefold or more in last 5 years. The aging population is a growing segment of interest.
Food preparation products	2106.90	-	341	7%	9%~29.8%+JPY 1,159 per kg	Competition is likely from Europe. Any flavorings may need to be tailored to the Japanese taste. Detailed processing outlines and ingredients must be known. Time must be taken to orient new prospective end users to learn how to use the product.	Low cost, labor saving and convenient food prep. products are welcome in a market where every aspect of food production and processing is expensive.

Sources: ATOs; MAFF Japan; METI Japan; Japan Frozen Food Association; Japan Tax agency; Chocolate and Cocoa Association of Japan; Ministry of Finance; World Trade Atlas; Pet Food Manufacturers Association and; Zenkoku Seiryou Inryou Kogyokai.

V. Key Tables and Charts

These following tables and charts are included to provide U.S. exporters with a better understanding of Japanese food market and economy.

Table A. Key Trade & Demographic Information

Data is for 2004, unless otherwise specified	
Agricultural Imports From All Countries ($Mil)/U.S. Market Share (%)	$67,365 / U.S. 22%
Consumer Food Imports From All Countries ($Mil/U.S. Market Share (%)	$22,386 / U.S. 19%
Edible Fishery Imports From All Countries ($Mil)/U.S. Market Share (%)	$13,880 / U.S. 10%
Total Population (Millions)/Annual Growth Rate (%)/8	127Mil. / .09%
Urban Population (Millions/Annual Growth Rate (%)/7	87.5 Mil. / 1.4%
Number of Major Metropolitan Areas/2	12/4
Size of the Middle Class (Millions)/Growth Rate (%)/6	86 Mil./5/N.A.
Per Capita Gross Domestic Product (U.S. Dollars)	$28,337
Unemployment Rate(%)	4.7%
Percent of Female Population Employed/3	48.71%
Exchange Rate (Japan Yen per US$)	Ann. Avg. - 108.2

1/ All Import Data from World Trade Atlas
2/Population in excess of 1,000,000
3/Percent against total number of women (15 years old or above)
4/For 2003
5/2003 Data
6/Based on 2nd, 3rd, 4th Income Quintiles calculated from Ministry of Health and Welfare, 2003.
7/ATO average annual estimate based on avg. growth of major pref. thru 2004, next Census under way in 2005
8/Calculated projection based on National Institute of Population and Social Security Research.
N.A./ Not Available
Sources: World Trade Atlas; Ministry of Health & Welfare; Statistics Bureau, Ministry of Internal Affairs and Communication; U.S. Bureau of Labor Statistics; World Bank; Bank of Japan.

Table B. Consumer Food and Edible Fishery Product Imports

Japanese Imports (in Millions of Dollars)	Imports from the World			Imports from the U.S.			U.S. Market Share %		
	2002	2003	2004	2002	2003	2004	2002	2003	2004
CONSUMER-ORIENTED AGRICULTURAL TOTAL	18,593	20,140	22,386	4,900	5,400	4,351	26	27	19
Snack Foods (excl Nuts)	582	666	740	109	109	119	19	16	16
Breakfast Cereals & Pancake Mix	74	82	90	29	23	22	39	28	24
Red Meats, Fresh/Chilled/Frozen	5,748	6,579	7,152	2,187	2,691	1,452	38	41	20
Red Meats, Prepared/Preserved	376	439	586	157	165	139	42	38	24
Poultry Meat	1,758	1,661	1,653	130	111	70	7	7	4
Dairy Products	1,147	1,183	1,369	100	90	126	9	8	9
Eggs & Products	153	154	201	50	44	39	33	29	20
Fresh Fruit	1,427	1,478	1,670	518	490	525	36	33	31
Fresh Vegetables	801	874	958	152	148	150	19	17	16
Processed Fruit & Vegetables	2,560	2,661	2,968	544	537	571	21	20	19
Fruit & Vegetable Juices	425	452	575	133	153	201	31	34	35
Tree Nuts	432	450	456	149	163	184	34	36	40
Wine & Beer	929	1,040	1,186	81	74	67	9	7	6
Nursery Products & Cut Flowers	377	410	462	10	9	9	3	2	2
Pet Foods (Dog & Cat Food)	741	791	830	292	283	281	39	36	34
Other Consumer-Oriented Products	1,383	1,562	1,847	333	372	438	24	24	24
FISH & SEAFOOD PRODUCTS	13,118	12,507	13,880	1,380	1,265	1,372	11	10	10
Salmon, Whole or Eviscerated	623	639	714	132	114	138	21	18	19
Salmon, Canned	31	38	47	2	2	2	5	6	4
Crab & Crabmeat	898	962	988	75	88	74	4	4	4
Surimi (Fish Paste)	637	521	599	269	185	239	42	36	40
Roe & Urchin (Fish Eggs)	944	943	1,010	473	460	489	50	49	48
Other Edible Fish & Seafood	10,640	9,940	11,141	699	601	668	7	6	6
AGRICULTURAL PRODUCT TOTAL	33,317	36,823	41,747	11,425	12,864	12,709	34	35	30
AGRICULTURAL, FISH & FORESTRY TOTAL	55,823	59,421	67,365	13,815	15,062	15,071	25	25	22

Source: World Trade Atlas

Table C. Top 15 Suppliers of Consumer Foods and Edible Fishery Products

Japan - Top 15 Suppliers

CONSUMER-ORIENTED AGRICULTURAL IMPORTS

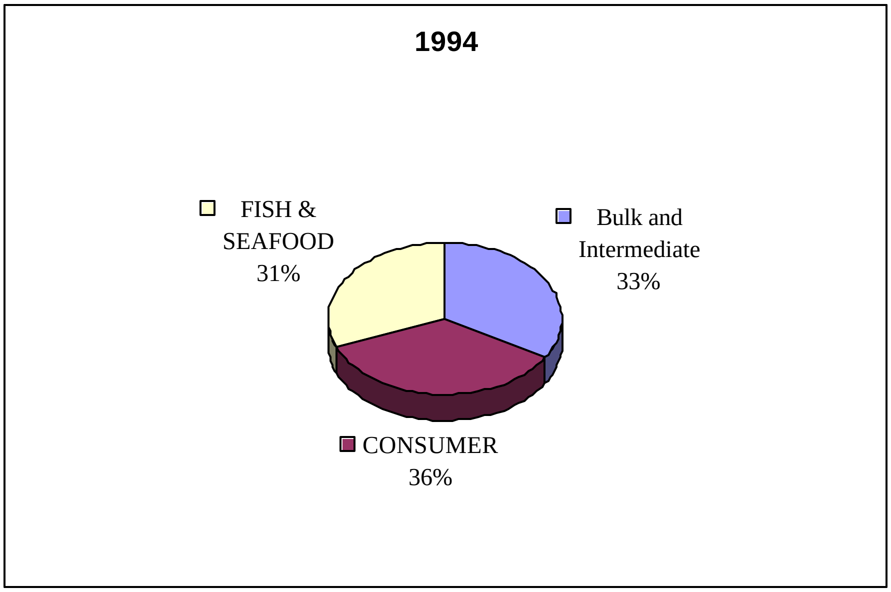
$1,000	2002	2003	2004
United States	4,899,530	5,400,063	4,350,810
China	2,835,259	2,943,390	3,404,950
Australia	1,491,451	1,816,601	2,806,926
Denmark	1,278,095	1,261,040	1,597,782
Canada	1,128,802	1,092,908	1,250,761
France	704,656	849,573	1,054,121
Thailand	1,123,303	1,210,257	1,014,551
New Zealand	678,124	719,183	964,434
Brazil	463,590	447,603	814,731
Philippines	538,813	564,954	650,824
Korea, South	424,401	469,382	505,128
Netherlands	306,647	385,287	419,438
Mexico	346,816	337,630	395,411
Chile	215,765	266,161	378,400
Italy	310,135	331,171	368,463
Other	1,847,227	2,044,832	2,409,460
World	18,592,613	20,140,034	22,386,189

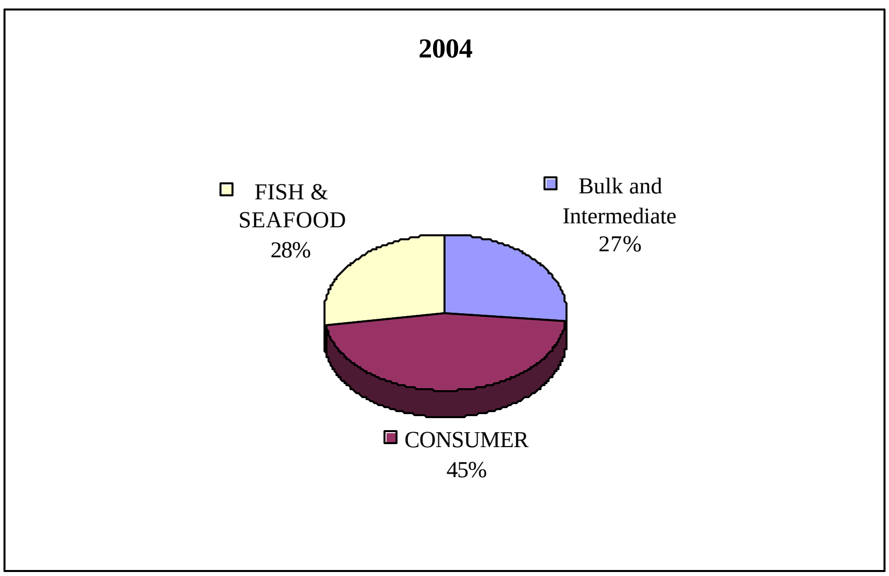
FISH & SEAFOOD PRODUCTS

	2002	2003	2004
China	2,316,522	2,268,418	2,798,489
United States	1,380,240	1,265,482	1,371,584
Russia	899,592	1,055,098	1,079,862
Thailand	1,040,014	965,807	1,015,393
Taiwan	658,591	685,869	813,000
Chile	562,187	607,664	787,039
Vietnam	549,773	626,997	764,604
Indonesia	889,874	798,588	759,904
Korea, South	706,172	591,837	657,523
Norway	578,976	498,127	517,764
Canada	496,605	449,598	512,002
Australia	430,117	328,116	342,848
India	360,864	260,894	283,136
Philippines	150,158	131,410	149,703
Spain	142,041	137,780	132,006
Other	1,956,409	1,834,904	1,895,592
World	13,118,134	12,506,589	13,880,449

Source: World Trade Atlas

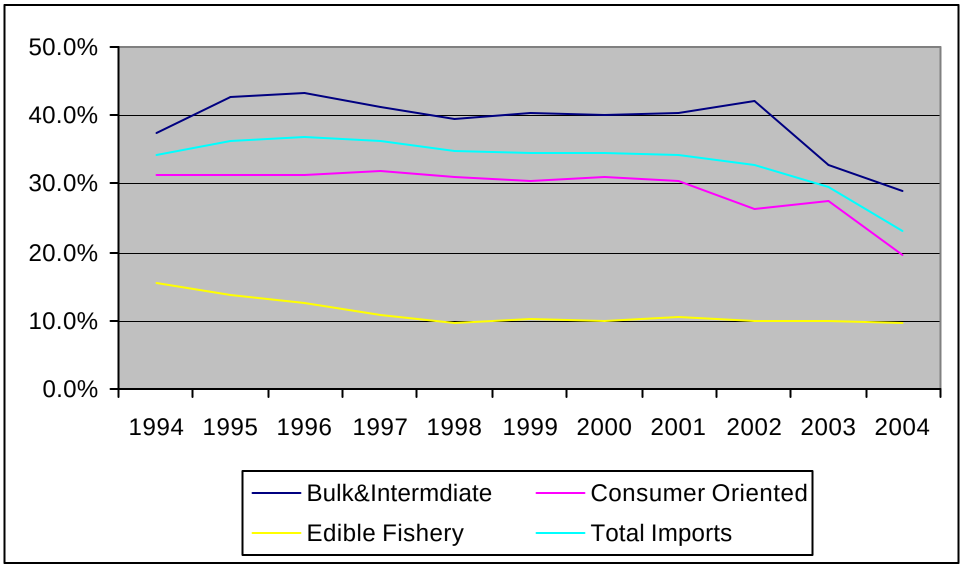
Chart 3. Change in Japanese Food Import Mix from All Sources





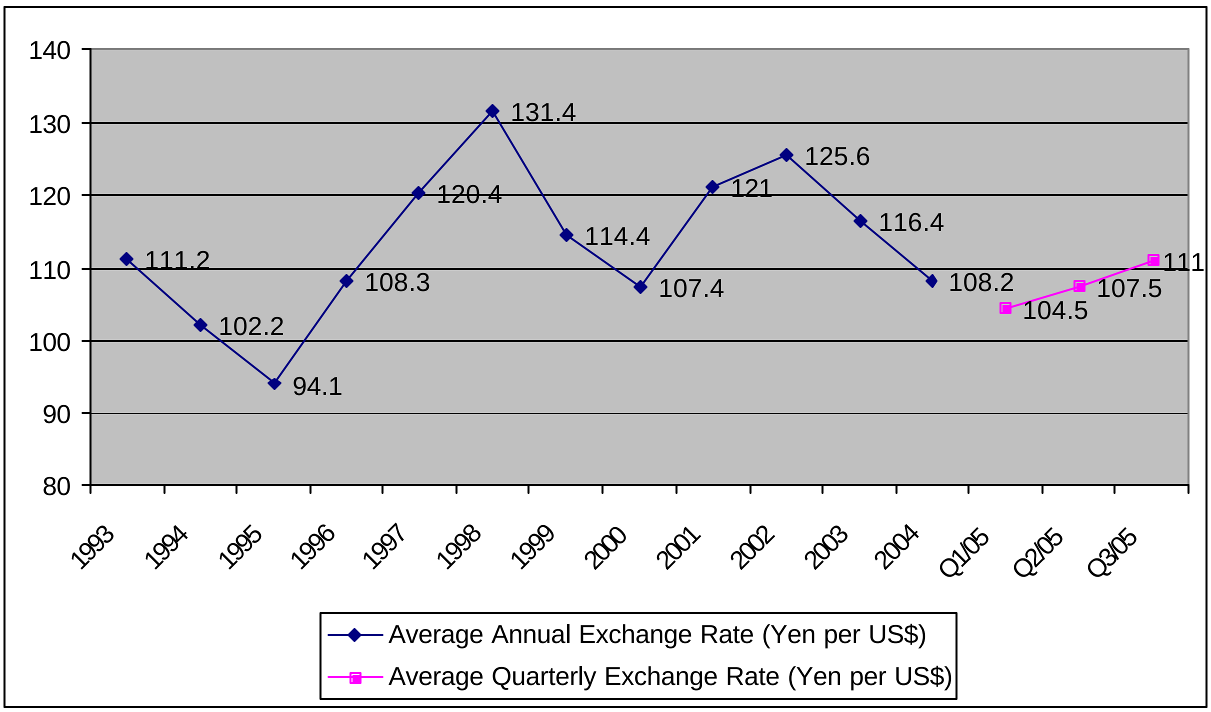
Source: UN Trade Statistics

Chart 4. Trends in U.S. Shares of Japanese Food and Agricultural Imports



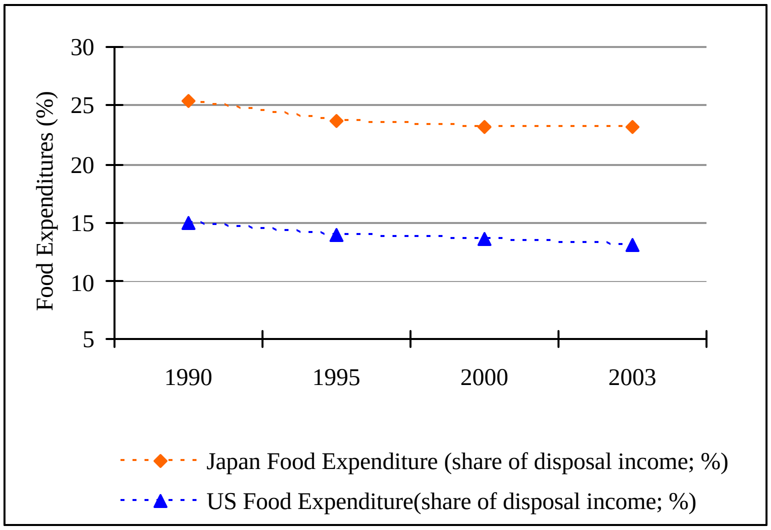
Sources: World Trade Atlas; Japan Customs.

Chart 5. Exchange Rate (JPY per US$) 1993-2005



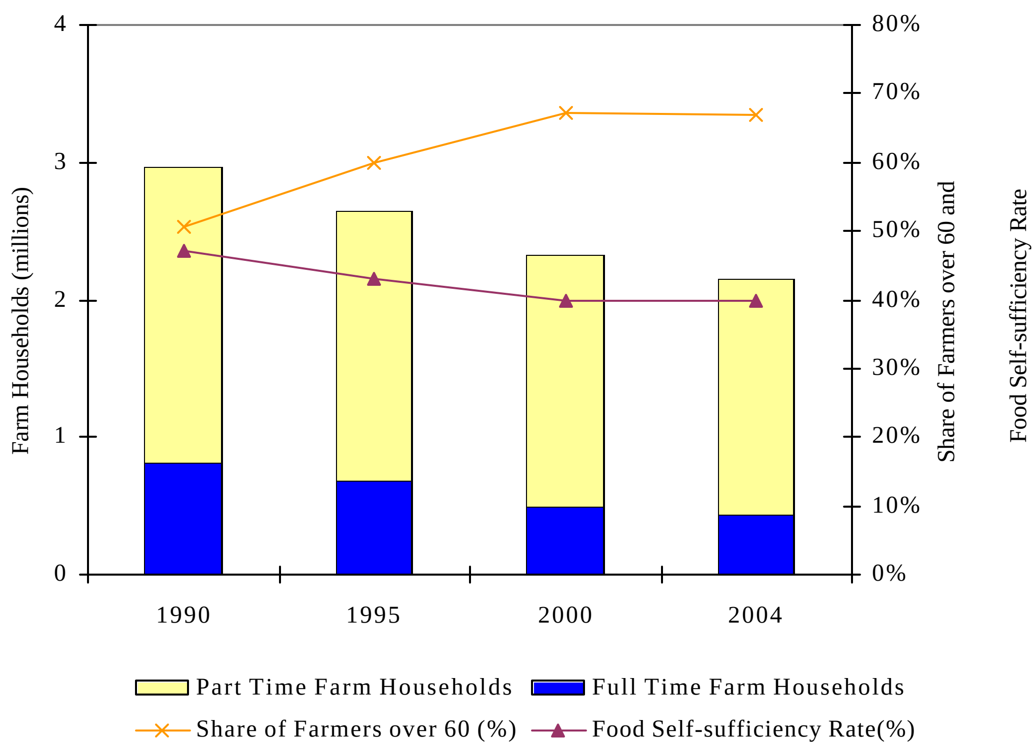
Sources: International Monetary Fund; World Bank; Japan Customs.

Chart 6. Japan's Food Expenditure Compared to the United States



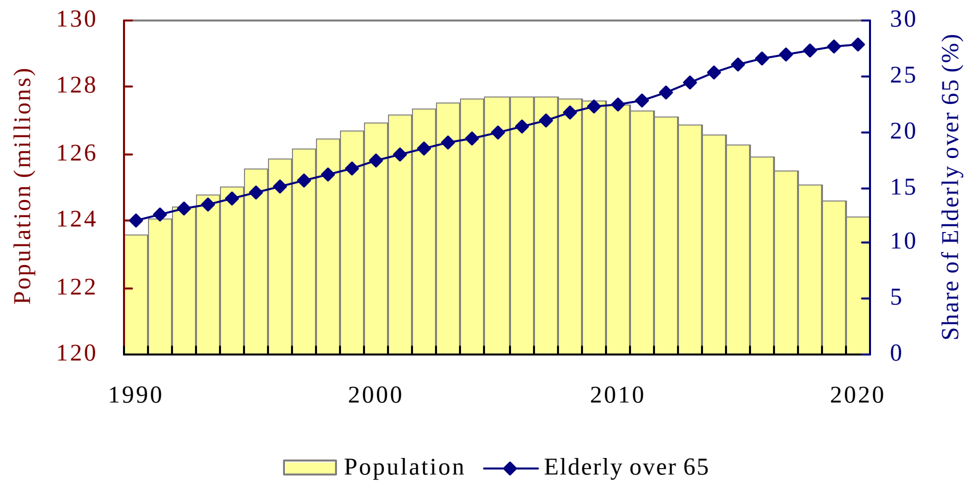
Sources: Statistics Bureau, MOF Japan; USDA.

Chart 7. Japanese Food Self –sufficiency Rate and Declining Farmer Population (1992-2004)



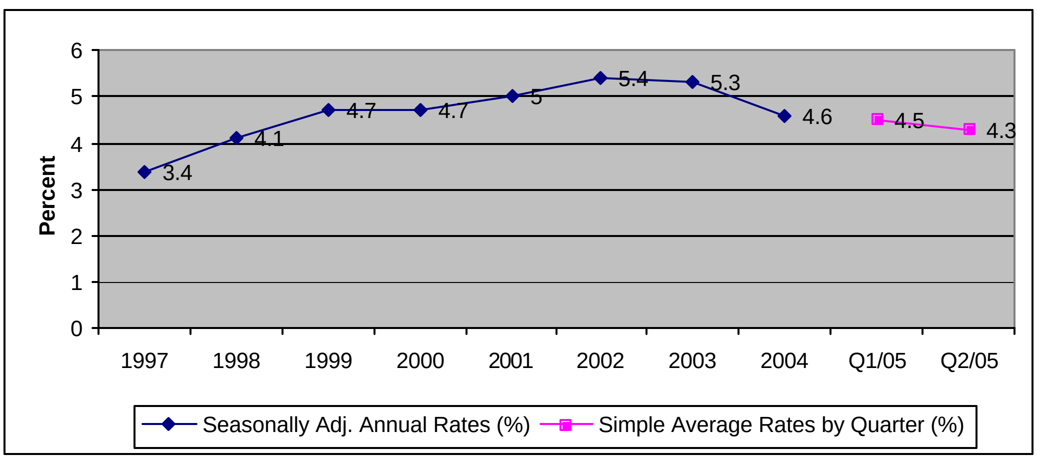
Sources: MAFF Japan; Ministry of Finance Japan.

Chart 8. Japan's Population Growth and Expected Decline



Source: National Institute of Population and Social Security Research.

Chart 9. Japanese Unemployment Rate 1997-2004



Source: National Institute of Population and Social Security Research; Statistical Bureau of Japan

Appendix A. Japanese Retailers

*2003 Average Exchange Rate of Y115.92 is used for both Appendix A and B

Table A-1: Top 10 Supermarkets (2004)

Rank	Company Name	Sales US$ bil.	No. of Outlets	Location	Telephone/Fax URL	Address
1	Aeon[/1]	42	688	Nationwide	Tel: 81(0)43-212-6000 Fax: 81(0)43-212-6849 www.aeongroup.net	1-5-1 Nakase, Mihama-ku, Chiba 261-8515
2	Ito-Yokado	36	177	Nationwide	Tel: 81(0)3-3459-2111 Fax: 81(0)3-3459-6873 www.itoyokado.iyg.co.jp	4-1-4 Shiba-Koen, Minato-ku, Tokyo 105-8571
3	Daiei	18	254	Nationwide	Tel: 81(0)3-3433-3211 Fax: 81(0)3-5968-6732 www.daiei.co.jp	2-4-1 Shibakoen, Minato-ku, Tokyo 105-8514
4	Uny	12	156	Chubu, Kanto	Tel: 81(0)587-24-8111 Fax: 81(0)587-24-8024 www.uny.co.jp	1 Amaike-Gotandacho, Inazawa City, Aichi Pref. 492-8680
5	Seiyu	10	209	Nationwide	Tel: 81(0)3-3598-7000 Fax: 81(0)3-3598-7763 www.seiyu.co.jp	2-1-1 Akabane, Kita-ku, Tokyo 115-0045
6	Izumi	4	75	Kinki, Chugoku	Tel: 81(0)82-264-3211 Fax: 81(0)82-26-5895 www.izumi.co.jp	2-22, Kyobashi-cho, Minami-ku Hiroshima-shi, Hiroshima 732-0828
7	Life corp	4	125	Nationwide	Tel: 81(0)6-6815-2600 www.lifecorp.jp	1-19-4 Higashi Nakajima Osakashi, Higashiyodogawa-ku 533-8558
8	Heiwado	4	114	Kinki, Chubu	Tel: 81(0)749-23-3111 Fax: 81(0)749-23-3254 www.from.co.jp/heiwado/	31,Koizumi-cho, Hikone-shi, Shiga 522-0043
9	Izumiya	4	86	Kinki	Tel: 81(0)6-6657-3310 Fax: 81(0)6-6657-3398 www.izumiya.co.jp	1-4-4 Hanazono-Minami, Nishinari-ku, Osaka 557-0015
10	Maruetsu	4	205	Kanto	Tel: 81(0)3-3590-1110 Fax: 81(0)3-3590-4642 www.maruetsu.co.jp	5-51-12 Higashi-Ikebukuro, Toshima-ku,Tokyo 170-8401

[/1]Total SM & GMS of Aeon group.

Table A-2: Top 10 Department Stores (2004)

Rank	Company Name	Sales US$ bil.	*No. of Outlets	Location	Telephone/Fax URL	Address
1	Takashimaya	10	20	Nationwide	Tel: 81(0)6-6631-1101 Fax: 81(0)6-6632-5195 www.takashimaya.co.jp	5-1-5 Namba, Chuo-ku, Osaka 542-8510
2	Mitsukoshi	9	22	Nationwide	Tel: 81(0)3-3241-3311 Fax: 81(0)3-3242-4559 www.mitsukoshi.co.jp	1-4-1 Nihonbashi-Muromachi, Chuo-ku, Tokyo 103-8001
3	Daimaru	8	16	Nationwide	Tel: 81(0)6-6271-1231 Fax: 81(0)6-6245-1343 www.daimaru.co.jp	1-7-1 Shinsaibashi-Suji, Chuo-ku, Osaka 542-8501
4	Isetan	6	7	Kanto	Tel: 81(0)3-3352-1111 Fax: 81(0)3-5273-5321 www.isetan.co.jp	3-14-1, Shinjyuku, Shinjyuku-ku, Tokyo, 160-8011
5	Marui	6	31	Kanto	Tel: 81(0)3-3384-0101 Fax: 81(0)3-5343-6615 www.0101.co.jp	4-3-2 Nakano, Nakano-ku Tokyo 164-8701
6	Seibu	5	18	Kanto	Tel: 81(0)3-3981-0111 www2.seibu.co.jp	1-28-1 Minami Ikebukuro Tokyo-to, Toshima-ku 171-8569

7	Sogou	5	12	Kansai	Tel: 81(0) 66281-3111 www.2.sogo-gogo.com	1-8-3 Chuou-ku Shinsaibashisugi, Osaka 542-0085
8	Hankyu	4	11	Kinki, Kanto	Tel: 81(0)6-6361-1381 Fax: 81(0)6-6486-6048 www.hankyu-dept.co.jp	8-7 Kakuta-cho, Kita-ku Osaka 530-8350
9	Matsuzakaya	3	10	Nationwide	Tel: 81(0)52-251-1111 Fax: 81(0)52-264-7140 www.matsuzakaya.co.jp	3-16-1 Sakae, Naka-ku, Nagoya 460-8430
10	Tokyu	3	11	Kanto	Tel: 81(0)3-3477-3111 Fax: 81(0)3-3496-7200 www.tokyu-depart.co.jp	2-24-1 Dogenzaka, Shibuya-ku Tokyo 150-8019

*Domestic Outlets only.

Table A-3: Top 10 Convenience Stores (2004)

Rank	Store Name (Parent)	Sales US$ bil	No. of Outlets	Location	Telephone/Fax URL	Address
1	Seven-Eleven (Ito-Yokado)	24	10,826	Nationwide	Tel: 81(0)3-3459-3711 Fax: 81(0)3-3459-6609 www.sej.co.jp	4-1-4 Shibakoen, Minato-ku, Tokyo 105-0011
2	Lawson (Mitsubishi)	13	8,077	Nationwide	Tel: 81(0)3-5476-6800 Fax: 81(0)3-5440-7621 www.lawson.co.jp	4-9-25 Shibaura, Minato-ku, Tokyo 108-8563
3	Family Mart (Itochu)	10	11,501	Nationwide	Tel: 81(0)3-3989-6600 Fax: 81(0)3-5396-1810 www.family.co.jp	4-26-10 Higashi-Ikebukuro, Toshima-ku, Tokyo 170-8404
4	CircleK Sunkus (Uny)	9	3,270	Nationwide	Tel: 81(0)3-5445-3456 Fax: 81(0)3-5445-3466 www.sunkus.co.jp	2-28-2 Shiba, Minato-ku, Tokyo 105-8539
5	Mini-Stop (AEON)	3	1,563	Kanto, Tokai, Kinki	Tel: 81(0)3-3294-9749 Fax: 81(0)3-3294-9791 www.ministop.co.jp	1-1 Kanda-Nishikicho, Chiyoda-ku, Tokyo 101-0054
6	Daily Yamazaki (Yamazaki)	2	1,937	Nationwide	Tel: 81(0)47-323-0001 Fax: 81(0)47-324-0082 www.daily-yamazaki.co.jp	Sun Plaza 35 Bldg., 1-9-2 Ichikawa, Ichikawa-shi, Chiba 272-8530
7	AM/PM (Japan Energy)	2	1,365	Nationwide	Tel: 81(0)3-5211-3600 Fax: 81(0)3-5211-3593 www.ampm.co.jp	13-1 Ichibancho, Chiyoda-ku Tokyo 102-0082
8	Seicomart	2	1,007	Hokkaido	Tel: 81(0)11-511-2796 Fax: 81(0)11-511-2834 www.seicomart.co.jp	Park 9-5 Bldg., Nishi 6, Minami 9, Chuo-ku, Sapporo 064-8620
9	Poplar	1	831	Nationwide	Tel: 81(0)82-837-3500 Fax:81(0)82-837-3540 http://www.poplar-cvs.co.jp/	655-1, Ooazahisaji, Asa-cho, Asakita-ku, Hioroshima 731-3395
10	Three F	1	631	Nationwide	Tel: 81(0)45-651-2111 www.three-f.co.jp	17 Naka-ku Nihon Odori, Yokohama-shi, Kanagawa-Ken 231-8507

*Sales of total shops (owned-store, franchised-store, and area franchised-store).

Table A-4: Top 10 Food Wholesalers (2004)

Rank	Company Name	Sales US$ bil	Location	Telephone/Fax URL	Address
1	Kokubu	13	Nationwide	Tel: 81(0)3-3276-4000 Fax: 81(0)3-3271-6523 www.kokubu.co.jp	1-1-1 Nihonbashi, Chuo-ku, Tokyo 103-8241
2	Ryoshoku	13	Nationwide	Tel: 81(0)3-3767-5111 Fax: 81(0)3-3767-0424 www.ryoshoku.co.jp	6-1-1 Heiwajima, Ota-ku, Tokyo 143-6556
3	Japan Access Access	8	Nationwide	Tel: 81(0)3-3410-4372 Fax: 81(0)3-3410-4626 www.yuki-access.co.jp	3-1-1 Nozawa, Setagaya-ku, Tokyo 154-8501
4	Itochu Foods	5	Nationwide	Tel: 81(0)6-6204-5901 Fax: 81(0)6-6204-5970 www.itochu-shokuhin.com	2-1-6 Koraibashi, Chuo-ku, Osaka 541-8578
5	Kato Sangyo	5	Nationwide	Tel: 81(0)798-33-7650 Fax:81(0)798-22-5637 www.katosangyo.co.jp	9-20, Matsubara-cho, Nishinomiya-shi, Hyogo 662-8543
6	Mitsui Shokuhin	5	Nationwide	Tel: 81(0)3-3551-1211 Fax: 81(0)3-5541-7467 www.sanyu-koami.co.jp	1-25-12 Shinkawa, Chuo-ku, Tokyo 104-8286
7	Meidi-ya Shoji	5	Nationwide	Tel: 81(0)3-3271-1111 Fax: 81(0)3-3273-6360 www.meidi-ya.co.jp	2-2-8, Kyobashi, Chuo-ku, Tokyo 104-8302
8	Asahi Foods	3	Nationwide	Tel: 81(0) 92- 474- 0711 www.asask.co.jp	2-15-5 Minami Harimaya-cho Kochishi, Kochi 780-8505
9	Yamae Hisano	2	Kyusyu-Kanto	Tel: 81(0) 92- 474-7763 Fax: 81(0)92-472-1263 www.yamaehisano.co.jp	13-34 Hakata Eki-Higashi 2-Chome Hakata-Ku, Fukuoka 812-8548
10	Maruichi Sansho	2	Nationwide	Tel: 026-285-4101 Fax: 026-285-3401 www.nishino.co.jp	3-48 Ichiba, Naganoken,, Naganoshi 381-2281

Soureces: Nikkei Marketing Journal “The Ranking 2004”, and company annual reports. Sales are shown by connection base.

Appendix B. Japanese Food Service Companies

*2003 Average Exchange Rate of Y115.92 is used for both Appendix A and B

Table B-1: Top 10 Commercial Restaurant Food Service Companies (2004)

Rank	Company Name	Sales US$ bil.	No. of Outlets	Location	Telephone/Fax URL	Address
1	McDonald's Japan	3.9	3,773	Nationwide	Tel: 81(0)3-3344-6251 Fax: 81(0)3-3344-6769 www.mcdonalds.co.jp	6-5-1 Nishi-Shinjuku, Shinjuku-ku, Tokyo 163-1339
2	Skylark	3.7	2,496	Nationwide	Tel: 81(0)422-51-8111 Fax:81(0)422-37-5240 www.skylark.co.jp	1-25-8 Nishi-Kubo, Musashino-shi, Tokyo 180-8580
3	Sukiya (Zensho Group)	1.6	635	Nationwide	Tel: 81(0)357-83-8850 www.zensho.com	2-18-1 JR Shinagawa East Building Minato-ku Konan, Tokyo-to 108-0075
4	Yoshinoya D&C	1.4	1,016	Nationwide	Tel: 81(0)3-5269-5111 Fax: 81(0)3-5269-5090 www.yoshinoya-dc.com	4-3-17 Shinjuku, Shinjuku-ku, Tokyo 160-0022
5	Monteroza	1.3	1,206	Nationwide	Tel: 81(0)422-36-8888 Fax: 81(0)422-36-8988 www.monteroza.co.jp	1-17-3 Nakamachi, Musashino-shi, Tokyo 180-0006
6	Kentucky Fried Chicken Japan	1.3	1,494	Nationwide	Tel: 81(0)3-3719-0231 Fax: 81(0)3-5722-7240 japan.kfc.co.jp	1-15-1 Ebisu-Minami, Shibuya-ku, Tokyo 150-8586
7	Duskin (Mister Donut)	1.3	1,319	Nationwide	Tel:81(0)6-6821-5006 Fax: 81(0)6-6821-5357 www.duskin.co.jp	1-33 Toyotsu-cho, Suita-shi, Osaka 564-0051
8	Reins International	1.2	1,188	Nationwide	Tel: 81(0)3-5775-2001 Fax: 81(0)3-5770-3001 www.reins.co.jp/	Roppongi Hills Mori Tower 29F, 6-10-1, Roppongi, Minato-ku, Tokyo 106-6129
9	Mos Food Services	1.2	1,483	Nationwide	Tel: 81(0)3-3266-7171 Fax: 81(0)3-3266-7110 www.mos.co.jp	22, Tansu-machi, Shinjuku-ku, Tokyo 162-8501
10	Royal (Royal Host)	1.1	511	Nationwide	Tel: 81(0)92-471-2479 Fax: 81(0)92-471-2525 www.royal.co.jp	3-28-5 Naka, Hakata-ku, Fukuoka 816-0093

Table B-2: Top 10 Hotel/Resort Food Service Companies (2004)

Rank	Company Name	Food Sales US$ bil.	No. of Outlets	Location	Telephone/Fax URL	Address
1	Prince Hotels	0.53	83	Nationwide	Tel: 81(0)3-3498-1111 Fax: 81(0)3-3498-1113 www.princehotels.co.jp	6-35-1 Jingumae, Shibuya-ku, Tokyo 150-0001
2	Imperial Hotel	0.31	3	Tokyo,Osaka, Kamikochi	Tel: 81(0)3-3504-1111 Fax: 81(0)3-3581-9146 www.imperialhotel.co.jp	1-1-1 Uchi-Sawaicho, Chiyoda-ku, Tokyo 100-8558
3	New Otani Hotels	0.28	29	Nationwide	Tel: 81(0)3-3265-1111 Fax: 81(0)3-3221-2619 www.newotani.co.jp	4-1 Kioicho, Chiyoda-ku, Tokyo 102-8578
4	Fujita Kanko	0.22	49	Nationwide	Tel: 81(0)3-3433-5154 Fax: 81(0)3-3433-5197 www.fujita-kanko.co.jp	1-9-15 Kaigan, Minato-ku, Tokyo 105-8551
5	Dai-ichi Hankyu Hotels	0.19	N/A	Kinki	www.dhh.jp	19-19, Chaya-machi, Kita-ku, Osaka-shi, Osaka
6	Keio Plaza Hotel	0.18	4	Tokyo, Sapporo	Tel: 81(0)3-3344-0111 Fax: 81(0)3-3345-8269 www.keioplaza.co.jp	2-2-1 Nishi Shinjuku, Shinjuku-ku, Tokyo 160-8330

7	Resort Trust	0.17	34	Nationwide	Tel: : 81(0)52-933-6000 www.resorttrust.co.jp	2-18-31, Higashisakura, Naka-ku, Nagoya, 460-8490
8	Rihga Royal Hotels	0.14	N/A	Nationwide	Tel: 81(0)6-6448-2898/Fax: 81(0)6-6448-3921 www.rihga.com	5-3-68, Nakanoshima, Kita-ku, Osaka, 530-0005
9	Hotel Okura	0.14	16	Nationwide	Tel: 81(0)3-3582-0111/Fax: 81(0)-3582-3707 www.hotelokura.co.jp	2-10-4 Toranomon, Minato-ku, Tokyo 105-8416
10	Mitsui Kanko Group	0.14	18	Nationwide	Tel: 81(0)3-3297-8831 www.mitsuikanko.co.jp	1-26-9, Shinkawa, Chuo-ku, Tokyo, 104-0033

Table B-3: Top 5 Institutional Food Service Companies (2004)

Rank	Company Name	Sales US$ bil.	Location	Telephone/Fax URL	Address
1	Shidax Food Service	1.56	Nationwide	Tel: 81(0)3-5908-1361 Fax: 81(0)3-5908-1360 www.shidax.co.jp	3-7-1 Nishi-Shinjuku Shinjuku-ku, Tokyo 163-1036
2	Nisshin Healthcare Food Service	1.56	Nationwide	Tel: 81(0)3-3230-2235 Fax: 81(0)3-3237-4923 www.nifs.co.jp	Kioicho Bldg. 16F, 3-12 Kioicho, Chiyoda-ku, Tokyo 102-8545
3	Aim Services	1.09	Nationwide	Tel: 81(0)3-3592-3721 Fax: 81(0)3-3502-6580 www.aimservices.co.jp	1-1-15 Nishi-Shimbashi, Minato-ku, Tokyo 105-0003
4	Seiyo Food Systems	0.99	Nationwide	Tel: 81(0)3-3984-0281 Fax: 81(0)3-3983-3475 www.seiyofood.co.jp	3-13-3, Higashi Ikebukuro, Toshima-ku, Tokyo, 170-0013
5	Green House	0.94	Nationwide	Tel: 81(0)3-3379-1211 Fax: 81(0)3-3370-9280 www.greenhouse.co.jp	3-20-2 Nishi-Shinjuku, Shinjuku-ku, Tokyo 163-1477

Table B-4: Top 5 Home Meal Replacement Sector and Bento Producers/Marketers (2004)

Rank	Company Name	Sales US$ bil.	No. of Outlets	Location	Telephone/Fax URL	Address
1	Plenus (Hokka hokka tei)	2.0	3,514	Nationwide	Tel: 81(0)3-3456-6601 Fax. 81(0)3-3456-6644 www.hurxley.co.jp	Sumitomo Shibaura Bldg. 3F, 4-16-36 Shibaura, Minatoku, Tokyo 108-0023
2	Honke Kamadoya	1.2	2,570	Nationwide	Tel: 81(0)78-251-2308 Fax: 81(0)78-251-3146 www.honkekamadoya.co.jp	1-1-5 Nunobikimachi, Chuo-ku, Kobe, Hyogo 651-0097
3	Kozosushi Chain	0.55	1,255	Nationwide	Tel: 81(0)3-3988-0541 www.kozosushi.co.jp	3-13-10, Minami Ikebukuro, Toshima-ku, Tokyo 171-0022
4	Pizza-La (Four Seeds)	0.53	601	Nationwide	Tel: 81(0)3-3409-6000 Fax: 81(0)3-5466-4400 www.pizza-la.co.jp	5-12-4 Zenkaren build. 5th floor, Minami Aoyama Minato-ku Tokyo-to, 107-0062
5	Origin Toshu	0.47	606	Nationwide	Tel: 81(0)3-3305-0180 Fax: 81(0)3-3305-0330 www.toshu.co.jp	3-2-4 Sengawacho, Chofu, Tokyo 182-0002

Note: All sales shown in Appendixes B have been taken from Nikkei Marketing Journal "The 31st Survey of Japan's Food Companies Ranking", and company annual reports.

Appendix C. Japanese Food Manufacturers by Product Category

Table C-1 Frozen Foods

Company Name	Share %	Main Product
Nichirei	20.0	Fried Rice and Vegetables
Katokichi	19.8	Fried Shrimp, frozen noodles
Ajinomoto Frozen Foods	11.6	Seasonings, cooking oils, home use products
Nichiro	11.2	Fisheries products, processed foods
Nippon Suisan Kaisha	7.5	Seafood

Table C-2 Ham & Sausage

Company Name	Share	Main Products
Nippon Meat Packers	22.8	Meat
Itoham Foods	20.9	Ham & Sausages
Marudai Food	16.7	Ham, Sausages & Meat
Prima Meat Packers	11.2	Meat
Yonekyu	6.0	Meat Products

Table C-3 Ice cream

Company Name	Share	Main Products
Ezaki Glico	11.9	Snack
Haagen-daz	11.7	Ice cream
Lotte	11.3	Ice cream, snack
Morinaga	11.1	Milk & Yogurt

Table C-4 Pasta		
Company Name	Share	Main Product
Nisshin Foods	30.2%	Flour, microwave pasta
Nippon Flour Mills	23.1%	Flour
Showa Sangyo	6.9%	Instant Noodles
Hagoromo Foods	6.6%	Instant Noodles
Okumoto Flour Milling	2.8%	Flour

Table C-5 Instant Noodle		
Company Name	Share	Main Product
Nisshin Seifun Group	40.7%	Flour
Toyo Suisan	17.7%	Seafood
Sanyo Foods	15.3%	Instant Noodles
Myojo Foods	10.1%	Instant Noodles
Acecook	6.7%	Instant Noodles

Table C-6 Beer		
Company Name	Share	Main Product
Asahi Breweries	39.6%	Beer
Kirin Breweries	34.4%	Beer
Sapporo Breweries	14.8%	Beer
Suntory	10.4%	Spirits, Wine, Beer
Orion Breweries	0.8%	Shochu

Table C-7 Soft Drinks		
Company Name	Share	Main Product
Coca-Cola	30.7%	Non-alcoholic drinks
Suntory	18.9%	Non-alcoholic drinks
Kirin Beverage	10.6%	Non-alcoholic drinks
Ito En	7.4%	Green Tea
Asahi Soft Drinks	6.4%	Green Tea

Table C-8 Baking		
Company Name	Sales US$ bil	Main Product
Yamazaki Baking	5.75	Baking
Shikishima Baking	1.09	Baking
First Baking	0.51	Baking
Nakamuraya	0.32	Baking and Sweets
Nichiryo Baking	0.18	Baking

Table C-9 Seafood		
Company Name	Sales US$ bil	Main Product
Maruha	6.40	Seafood, Processed food
Nippon Suisan	3.97	Seafood, Processed food
Nichiryo	2.17	Seafood, Processed food
Kyokuyo	1.29	Seafood, Processed food
Hosui	0.17	Seafood

Table C-10 Tonic Drinks/Over-the-Counter Preparations		
Company Name	Share	Main Product
Taisho Pharmaceutical	46.2	Tonic drinks
Sato Pharmaceutical	11.0	Health drinks
Takeda Pharmaceutical	6.5	Tonic drinks
Taiho Pharmaceutical	6.4	Amino acid products
SSP	6.3	Tonic Drinks

Appendix C Sources: Nihon Keizai Shimbun, Inc. “Domestic Share Survey”, 2005.

Appendix D. Key Contacts

Table D-1: U.S. Government

Organization Name	Telephone/Fax URL/E-mail	Address
Agricultural Trade Office American Embassy, Tokyo	Tel: 81(0)3-3505-6050 Fax: 81(0)3-3582-6429 www.atojapan.org atotokyo@usda.gov	1-10-5 Akasaka Minato-ku, Tokyo 107-8420
Agricultural Trade Office American Consulate-General, Osaka	Tel: 81(0)6-6315-5904 Fax: 81(0)6-6315-5906 www.atojapan.org atoosaka@usda.gov	2-11-5 Nishi-Tenma Osaka 530-8543
ATO's GAF Market B-to-B website	http://www.greatamericanfood.info/	2-11-5 Nishi-Tenma Osaka 530-8543
Agricultural Affairs Office, American Embassy, Tokyo	Tel: 81(0)3-3224-5105 Fax: 81(0)3-3589-0793 agtokyo@usda.gov	1-10-5 Akasaka Minato-ku, Tokyo 107-8420
American Embassy Tokyo, Japan	Tel: 81(0)3-3224-5000 Fax: 81(0)3-3505-1862 usembassy.state.gov/tokyo/	1-10-5 Akasaka Minato-ku, Tokyo 107-8420
Animal and Plant Health Inspection Service (APHIS)	Tel: 81(0)3-3224-5111 Fax: 81(0)3-3224-5291 www.aphis.usda.gov	1-10-5 Akasaka, Minato-ku, Tokyo 107-8420
FAS Washington	www.fas.usda.gov	1400 Independence Ave., SW Washington, DC 20250
USDA Washington	www.usda.gov	1400 Independence Ave., SW Washington, DC 20250

Table D-2: U.S. State Government Offices in Japan

Organization Name	Telephone/Fax URL	Address
Alabama	Tel: 81(0)3-5232-3851 Fax: 81(0)3-5232-3850 www.ado.state.al.us	Aoki Bldg. 8F, 5-32-8 Shiba Minato-ku, Tokyo 108-0014
Alaska	Tel: 81(0)3-3556-9621 Fax:03-3556-9623 www.alaska.or.jp	Room 307 Central Bldg. 22-1, Ichibancho Chiyoda-ku, Tokyo 102-0082
Arizona	Tel: 81(0)3-5421-0845 Fax: 81(0)3-5421-0845 http://www.azcommerce.com/itrade	AIOS Hiroo Bldg. 5F, 1-11-2 Hiroo Shibuya-ku, Tokyo 150-0012
Arkansas	Tel: 81(0)3-5447-7471 Fax: 81(0)3-5447-7472 www.1-800-arkansas.com	AIOS Hiroo Bldg. 8F, 1-11-2 Hiroo Shibuya-ku, Tokyo 150-0012
Colorado	Tel: 81(0)3-5272-1041 Fax: 81(0)3-3207-6685 www.colorado.japan.org	2-3-26 Nishi-Waseda Shinjuku-ku, Tokyo 169-0051
Delaware	Tel: 81(0)3-5326-3494 Fax: 81(0)3-5326-3480 www.delaware.gov	Park Tower Bldg. 30F 3-7-1, Nishishinjuku, Shinjuku-ku, Tokyo 163-1030
Florida	Tel: 81(0)3-3230-1821 Fax: 81(0)3-5213-8169 www.eflorida.com	3-1-1 Kojimachi Chiyoda-ku, Tokyo 102-0083
Georgia	Tel: 81(0)3-3539-1676 Fax: 81(0)3-3504-8233 www.georgia.org	2-7-16 Toranomon, Minato-ku, Tokyo 105-0001
Illinois	Tel: 81(0)3-3268-8011 Fax:81(0)3-3268-8700 www.commerce.state.il.us	2-1 Ichigaya, Ichigaya Sadoharacho Shinjuku-ku, Tokyo 162-0842
Indiana	Tel: 81(0)45-228-0625 Fax: 81(0)45-211-1192 www.venture-web.or.jp/indiana/	1-1 Sakuragicho Naka-ku, Yokohama 231-0062
Iowa	Tel: 81(0)3-3222-6901 Fax: 81(0)3-3222-6902 www.smart.state.ia.us	Room 903 Central Bldg, 22-1 Ichibancho Chiyoda-ku, Tokyo 102-0082
Kansas	Tel: 81(0)3-3239-2844 Fax: 81(0)3-3239-2848 www.kansascommerce.com	Kioicho WITH Bldg 4F, 3-32 Kioicho Chiyoda-ku, Tokyo 102-0094
Kentucky	Tel: 81(0)3-3582-2334 Fax: 81(0)3-3588-1298 www..kentucky-net.com	2-5-8 Akasaka Minato-ku, Tokyo 107-0052
Michigan	Tel: 81(0)45-290-3650 Fax: 81(0)45-290-3605 www.michigan.org	1-2-20 Hiranuma Nishi-ku, Yokohama, Kanagawa 220-0023

Minnesota	Tel: 81(0)3-5434-3991 Fax: 81(0)3-5740-6433 www.dted.state.mn.us	7-3-16 Nishi-Gotanda Shinagawa-ku, Tokyo 141-0031
Mississippi	Tel: 81(0)45-222-2047 Fax: 81(0)45-222-2048 www.mississippi.org	Yokohama World Porters 6F, 2-2-1 Shinko Naka-ku, Yokohama 231-0001
Missouri	Tel: 81(0)3-3586-1496 Fax: 81(0)3-3586-1498 www.ecodev.state.us.mo	S-303, Ark Executive Tower, 1-14-5 Akasaka Minato-ku, Tokyo 107-0052
New Jersey	Tel: 81(0)3-3213-5330 Fax: 81(0)3-3213-5336 www.state.nj.us	Kokusai Bldg. Suite 238, 3-1-1 Marunouchi Chiyoda-ku, Tokyo 100-0005
New York	Tel: 81(0)3-3503-5196 Fax: 81(0)3-3509-1020 www.empire.state.ny.us	Mori Bldg 6F, 2-6-4 Toranomon Minato-ku, Tokyo 105-0001
North Carolina	Tel: 81(0)3-3435-9301 Fax: 81(0)3-3435-9303 www.commerce.state.nc.us	Suzuki Bldg 5F, 3-20-4 Toranomon Minato-ku, Tokyo 105-0001
Ohio	Tel: 81(0)3-3262-1312 Fax: 81(0)3-3239-6477 www.state.oh.us	Hirakawacho Bldg 7F, 2-6-1 Hirakawacho Chiyoda-ku, Tokyo 102-0093
Oregon	Tel: 81(0)3-3580-8951 Fax: 81(0)3-3580-9071 www.state.or.us	Shimbashi Hara Bldg. 3F, 2-10-5 Shimbashi Minato-ku, Tokyo 105-0004
Pennsylvania	Tel: 81(0)3-3505-5107 Fax: 81(0)3-5549-4127 www.pa-japan.org	KY Bldg 7F, 3-16-14, Roppongi Minato-ku, Tokyo 106-0032
South Carolina	Tel: 81(0)3-5408-5461 Fax: 81(0)3-5408-5462 www.myscgov.com	Annex 2-Gokan 5F, 3-8-27 Toranomon Minato-ku, Tokyo 105-0001
Tennessee	Tel: 81(0)45-222-2041 Fax: 81(0)45-222-2043 www.state.tn.us	Yokohama World Porters 6F, 11 Shinko-cho Naka-ku, Yokohama 231-0001
Texas	Tel: 81(0)3-3589-6627 Fax: 81(0)3-3589-6638 www.state.tx.us	1 Azabu-Nagasaka, Minato-ku, Tokyo 106-0043
Virginia	Tel: 81(0)3-3539-3661 Fax: 81(0)3-3539-3669 www.yesvirginia.org	Imperial Tower 8F, 1-1-1 Uchisaiwaicho Chiyoda-ku, Tokyo 100-0011
Washington	Tel: 81(0)3-3459-0896 Fax: 81(0)3-3459-0897 www.trade.wa.gov	5-4-8-301 Toranomon Minato-ku, Tokyo 105-0001
West Virginia	Tel: 81(0)52-953-9798 Fax: 81(0)52-953-9795 www.wv-jp.net	3-24-17 Nishiki Naka-ku, Nagoya 460-0003

Table D-3: U.S. Trade Associations and Cooperator Groups in Japan

Organization Name	Telephone/Fax URL	Address
Alaska Seafood Marketing Institute	Tel: (81-3) 3990-1767 Fax: (81-3) 3990-4725 www.alaskaseafood.org	5-5-10-207, Tagara, Nerima-ku Tokyo, 179-0073
Almond Board of California	Tel: (81-3) 5776-7135 Fax: (81-3) 5776-7136 www.almond.org	Otemachi Tatemono Kamiyacho Bldg., 7F, 5-12-13 Toranomon, Minato-ku, Tokyo 105-0001
American Seafood Institute	Tel: (81-3) 3990-1767 Fax: (81-3) 3990-4725 http://www.americanseafood.org	5-5-10-207, Tagara, Nerima-ku Tokyo, 179-0073
American Soybean Association	Tel: (81-3) 5563-1414 Fax: (81-3) 5563-1415 http://www.asajapan.org/	KY Tameike Bldg., 4F 1-6-19 Akasaka Minato-ku, Tokyo 107-0052
Blue Diamond Growers	Tel: (81-3) 3506-8877 Fax: (81-3) 3506-8883 www.bluediamond.com	Toranomon NS Bldg 3F, 1-22-15 Toranomon Minato-ku, Tokyo 105-0001
California Cherry Advisory Board	Tel: (81-45) 641-3111 Fax: (81-45) 663-1646 www.calcherry.com	Toshin Bldg. 9B, 4-17 Kaigandori Naka-ku, Yokohama, Kanagawa 231-0005
California Fig Advisory Board	Tel: (81-3) 5766-2753 Fax: (81-3) 5766-2738 www.californiafigs.com	Takushin Bldg, Honkan 7F, 3-27-11, Shibuya-ku, Tokyo 105-0002
California Nectarine & Fresh Prune Commission	Tel: (81-45) 641-3111 Fax: (81-45) 663-1646 www.caltreefruit.com	Toshin Bldg. 9B, 4-17 Kaigandori Naka-ku, Yokohama, Kanagawa 231-0005
California Pistachio Commission	Tel: (81-3) 3403-8288 Fax: (81-3) 3403-8289 www.pistachios.org	9-6-28-702 Akasaka Minato-ku, Tokyo 107-0052
California Prune Board	Tel: (81-3) 3584-0866 Fax: (81-3) 3505-6353 www.californiadriedplums.org	Pacific Bldg.3F, 1-5-3 Higashiazabu Minato-ku, Tokyo 106-0044
California Strawberry Commission	Tel: (81-3) 3588-1454 Fax: (81-3) 3505-6353 www.calstrawberry.com	Pacific Bldg.3F, 1-5-3 Higashiazabu Minato-ku, Tokyo 106-0044
California Table Grape Commission	Tel: (81-3) 3221-6410 Fax: (81-3) 3221-5960 www.tablegrape.com	Seibunkan Bldg, 5F, 5-9, Iidabashi, 1-chome, Chiyoda-ku Tokyo, 102-0072
California Walnut Commission	Tel: (81-3) 3588-1454 Fax: (81-3) 3505-6353 www.walnuts.org	Pacific Bldg.3F, 1-5-3 Higashiazabu Minato-ku, Tokyo 106-0044
Cherry Marketing Institute	Tel: (81-3) 5770-7533 Fax: (81-3) 5413-7321 www.cherrymkt.com/	9F Moto Akasaka Bldg, 1-7-10 Moto Akasaka Minato-ku, Tokyo 107-0051
Cranberry Marketing Committee	Tel: (81-45) 641-3111 Fax: (81-45) 663-1646 www.uscranberries.com	Toshin Bldg. 9B, 4-17 Kaigandori Naka-ku, Yokohama, Kanagawa 231-0005
Dairy Export Council, U.S.	Tel: (81-3) 3221-6410 Fax: (81-3) 3221-5960 www.usdec.org	Seibunkan Bldg, 5F, 5-9, Iidabashi, 1-chome, Chiyoda-ku Tokyo, 102-0072
Dry Pea & Lentil Council, USA	Tel: (81-3) 3288-0282 Fax: (81-3) 3288-0283 (n.a.)	3-3-17 Kudan Minami Chiyoda-ku, Tokyo 102-0074
Florida Department of Citrus	Tel: (81-3) 3584-7019 Fax: (81-3) 3582-5076 www.floridajuice.com	Suite 310, 1-11-36 Akasaka Minato-ku, Tokyo 107-0052
Grains Council, U.S.	Tel: (81-3) 3505-0601 Fax: (81-3) 3505-0670 www.grains.org	KY Tameike Bldg., 4F, 1-6-19 Akasaka Minato-ku, Tokyo 107-0052
Hawaii Papaya Industry Association	Tel: (81-6) 4560-6031 Fax: (81-6) 4560-6039 (n.a.)	Nakanoshima Central Tower, 2-2-7 Nakanoshima Kita-ku, Osaka 530-0005
Idaho Potato Commission	Tel: (81-3) 5766-2753 Fax: (81-3) 5766-2738 www.idahopotatoes.com	Takushin Bldg, Honkan 7F, 3-27-11, Shibuya-ku, Tokyo 105-0002
Meat Export Federation, U.S. (Tokyo Office)	Tel: (81-3) 3584-3911 Fax: (81-3) 3587-0078 www.americanmeat.jp	KY Tameike Bldg., 5F, 1-6-19 Akasaka Minato-ku, Tokyo 107-0052
Meat Export Federation, U.S. (Osaka Office)	Tel: (81-6) 6315-5105 Fax: (81-6) 6315-5103 www.americanmeat.jp	c/o American Consulate-General 10F 2-11-5 Nishitenma, Kita-ku, Osaka 530-8543
National Dry Bean Council	Tel: (81-3) 3221-6410 Fax: (81-3) 3221-5960 (n.a.)	Seibunkan Bldg. 5F, 1-5-9 Iidabashi Chiyoda-ku, Tokyo 102-0072
National Honey Board	Tel: (81-3) 5766-2753 Fax: (81-3) 5766-2738 www.nhb.org/, www.nhb.jp/	Takushin Bldg, Honkan 7F, 3-27-11, Shibuya-ku, Tokyo 105-0002

Northwest Cherry Growers	Tel: (81-3) 5770-7533 Fax: (81-3) 5413-7321 www.nwcherries.com	Moto Akasaka Bldg, 9F, 1-7-10 Moto Akasaka Minato-ku, Tokyo 107-0051
Oregon Wine Board	Tel: (81-3) 3266-9978 Fax: (81-3) 3266-9299 http://oregonwine.org/	291-1-502 Yamabuki-cho Shinjuku-ku, Tokyo 162-0801
Pet Food Institute	Tel: (81-3) 5789-5398 Fax: (81-3) 5789-5399 www.petfoodinstitute.org	Yebisu Garden Place Tower, 18F, 4-20-3 Yebisu Shibuya-ku, Tokyo 150-6018
Potato Board, U.S.	Tel: (81-3) 3505-5737 Fax: (81-3) 3505-6353 www.potatoesusa-japan.com	Pacific Bldg. 3F, 1-5-3 Higashiazabu Minato-ku, Tokyo 106-0044
Poultry and Egg Export Council, USA	Tel: (81-3) 3403-8288 Fax: (81-3) 3403-8289 www.usapeec.org	9-6-28-702 Akasaka Minato-ku, Tokyo 107-0052
Raisin Administrative Committee	Tel: (81-3) 3221-6410 Fax: (81-3) 3221-5960 www.raisins-jp.org	Seibunkan Bldg. 5F, 1-5-9 Iidabashi Chiyoda-ku, Tokyo 102-0072
Rice Federation, USA	Tel: (81-3) 3505-5752 Fax: (81-3) 3505-6353 www.usarice.com	Pacific Bldg. 3F, 1-5-3 Higashiazabu Minato-ku, Tokyo 106-0044
Sunkist Pacific Ltd.	Tel: (81-3) 3523-0717 Fax: (81-3) 3523-0710 www.sunkist.com	New River Tower, 8F, 1-6-11, Shinkawa, Tyuo-ku, 104-0033
U.S. Tomato Commission	Tel: (81-3) 3584-7019 Fax: (81-3) 3582-5076 http://www.floridatomatoes.org/ http://www.tomato.org/splash.html	Suite 310, 1-11-36 Akasaka Minato-ku, Tokyo 107-0052
Washington State Fruit Commission	Tel: (81-3) 5770-7533 Fax: (81-3) 5413-7321 http://www.nwcherries.com/index.html	Moto Akasaka Bldg, 9F, 1-7-10 Moto Akasaka Minato-ku, Tokyo 107-0051
Washington Wine Commission	Tel & Fax: (81-3) 3413-6832 http://www.washingtonwine.org/	Urban Court, 3-17-18 Daita, Setagaya-ku, Tokyo 155-0033
Western Growers Association	Tel: (81-3) 5524-0300 Fax: (81-3) 5524-1102 http://www.wga.com/public/index.php	Nihon Kochiku Bldg., 6F. 2-9-12 Kyobashi, Chuo-ku, Tokyo104-0031
Wheat Associates, U.S.	Tel: (81-3) 3582-7911 Fax: (81-3) 3582-7915 www.uswheat.org	Toshin Tameike Bldg.5F, 1-1-14 Akasaka Minato-ku, Tokyo 107-0052
Wild Blueberry Association of North America	Tel: (81-3) 5766-2753 Fax: (81-3) 5766-2738 www.wildblueberries.com	Takushin Bldg, Honkan 7F, 3-27-11, Shibuya-ku, Tokyo 105-0002
Wine Institute of California	Tel: (81-3) 3707-8960 Fax: (81-3) 3707-8961 www.wineinstitute.org	2-24-6-403 Tamagawa Setagaya-ku, Tokyo 158-0094

Table D-4: U.S. Laboratories Approved by the Japanese Government*

Organization Name	Telephone/Fax URL	Address
California Export Laboratory Services, California Department of Food and Agriculture, Center for Analytical Chemistry	Tel: 916-262-1434 Fax: 916-262-1572 www.cdfa.ca.gov/is/cac/	3292 Meadowview Rd. Sacramento, CA 95832
Oregon Department of Agriculture, Export Service Center	Tel: 503-872-6630 Fax: 503-872-6615 www.oda.state.or.us/lab/esc.html	1207 NW Naito Prkway #224 Portland, OR 97209-2851
ABC Research Corporation	Tel: 904-372-0436 Fax: 904-378-6483 www.abcr.com	3437 SW 24th Ave. Gainesville, FL 32602
ACTS Testing Labs	Tel: 716-505-3300 Fax: 716-505-3301 www.mtl-acts.com	100 Northpoint Parkway Buffalo, NY 14228-1884
ANRESCO, Inc.	Tel: 415-822-1100 Fax: 415-822-6615 www.anresco.com	1370 Van Dyke Ave. San Francisco, CA 94124-3313
Bolin Laboratories, Inc.	Tel: 602-942-8220 Fax: 602-942-1050 (n.a.)	17631 N. 25th Ave. Phoenix, AZ 85023
Cargill Analytical Services Laboratory	Tel: 417-451-5973 Fax: 417-451-5478 www.cargill.com	Crowder Industrial Park, 4301 Doniphane Dr. Neosho, MO 64850
Central Analytical Laboratories, Inc	Tel: 504-393-5290 Fax: 504-393-5270 www.centralanalytical.com	101 Woodland Hwy. Belle Chasse, LA 70037
Certified Laboratories, Inc.	Tel: 516-576-1400 Fax: 516-576-1410 www.800.certlab.com	200 Express Street, Plainview, NY 11803
Certified Laboratories of California, Inc	(n.a.)	1156 N.Fountain Way #D, Anaheim, CA 92806
Columbia Food Laboratories, Inc.	Tel: 503-695-2287 Fax: 503-695-5187 www.columbiafoodlab.com	36740 E. Historic Columbia River Hwy. P.O. Box 353 Corbett, OR 97019
Covance Laboratory	Tel: 888-268-2623 Fax: 608-241-7227 www.covance.com/analytical	3301 kinsman Blvd. Madison, WI 53704
Food Products Laboratory, Inc.	Tel: 503-253-9136 Fax: 503-253-9019 www.fplabs.com	12003 NE Ainsworth Cir., Suite 105 Portland, OR 97220-1099
Irvine Analytical Laboratories, Inc.	Tel: 877-445-6554 Fax: 949-951-4909 ialab.com	10 Vanderbilt Dr. Irvine, CA 92618
Midwest Research Institute	Tel: 816-753-7600 Fax: 816-753-8420 www.mriresearch.org	425 Volker Blvd. Kansas City, MO 64110-2299
Michelson Laboratories	Tel: 562-928-0553 Fax: 562-927-6625 www.michelsonlab.com	6280 Chalet Dr. Commerce, CA 90040-3761
Mictobac Laboratories, Inc.	Tel: 909-734-9600 Fax: 909-734-2803 www.microbac.com	280 North Smith Ave Corona, CA 91720
The National Food Laboratory, Inc.	Tel: 925-828-1440 Fax: 925-933-9239 www.thenfl.com	6363 Clark Ave. Dublin, CA 94568-3097
OMIC USA, Inc.	Tel: 503-223-1497 Fax: 503-223-9436 www.omicusa.com	1200 NW Front Ave., Suite 100 Portland, OR 97209
Primus Laboratories	Tel: 805-922-0055 Fax: 805-922-2462 www.primuslabs.com	2810 Industrial Parkway Santa Maria, CA 93455
Silliker Laboratories of Illinois, Inc.	Tel: 708-957-7878 Fax: 708-957-8449 www.silliker.com	900 Maple Road, Homewood, IL 60430
West Coast Food Center	Tel: 503-254-5143 Fax: 503-254-1452 www.wcfc.com	12423 NE Whitaker Way Portland, OR 97230

*Also found on Ministry of Agriculture website: http://www.mhlw.go.jp/topics/yunyu/5/dl/a3.pdf

Table D-5: Japanese Government

Organization Name	Telephone/Fax URL	Address
Japan External Trade Organization (JETRO)	Tel: 81(0)3-3582-5521, Fax: 81(0)3-3582-0504 www.jetro.go.jp	2-2-5 Toranomon Minato-ku, Tokyo 105-8466
Min. of Agriculture, Forestry and Fisheries	Tel: 81(0)3-3502-8111 www.maff.go.jp	1-2-1 Kasumigaseki Chiyoda-ku, Tokyo 100-0013
Ministry of Health, Labor and Welfare	Tel: 81(0)3-5253-1111 www.mhlw.go.jp	1-2-2 Kasumigaseki Chiyoda-ku, Tokyo 100-0013
Zen-noh (JA)	Tel: 81(0)3-3245-7854 Fax: 81(0)3-3245-7444 www.zennoh.or.jp	1-8-3 Otemachi Chiyoda-ku, Tokyo 100-004
JETRO Atlanta	Tel: 404-681-0600 Fax:404-681-0713 www.jetroatlanta.org	245 Peachtree Center Avenue, Suite 2208 Atlanta, GA30303
JETRO Chicago	Tel: 312-832-6000 Fax: 32-832-6066 www.jetrocgo.org	401 North Michigan Avenue, Suite 660 Chicago, IL. 60611
JETRO Denver	Tel: 303-629-0404 Fax: 303-893-9533 www.jetro.go.jp/usa/denver	1200 Seventeenth Street, Suite 1110 Denver, CO 80202
JETRO Houston	Tel: 713-759-9595 Fax: 713-759-9210 www.jetro.go.jp/usa/houston	1221 McKinney, Suite 2360 Houston, TX 77010
JETRO Houston Dallas Branch	Tel: 214-651-0839 Fax: 214-651-1831 (n.a.)	Suite 152-1, World Trade Center 2050 Stemmons Freeway, Dallas, TX 75207
JETRO Los Angeles	Tel: 213-624-8855 Fax: 213-629-8127 www.jetro.org/losangeles	777 South Figueroa Street, Suite 4900 Loa Angeles, CA 90017
JETRO New York	Tel: 212-997-0400 Fax: 212-997-0464 www.jetro.org/newyork	1221 Avenue of the Americas, 42nd Floor New York, NY 100020-1079
JETRO San Francisco	Tel:415-392-1333 Fax: 415-788-6927 www.jetro.org/sanfrancisco	235 Pine Street, Suite 1700 San Francisco, CA 94104

Table D-6: Japanese Associations - Food

Organization Name	Telephone/Fax URL	Address
All Japan Confectionery Assoc.	Tel: 81(0)3-3431-3115 Fax: 81(0)3-3432-1660 (n.a.)	5-14-3 Shimbashi Minato-ku, Tokyo 105-0004
All Japan Dry Noodle Assoc.	Tel: 81(0)3-3666-7900 Fax: 81(0)3-3669-7662 www.kanmen.com	15-6 Nihonbashi Kabutocho Chuo-ku, Tokyo 103-0026
All Japan Pasta Assoc.	Tel: 81(0)3-3667-4245 Fax: 81(0)3-3667-4245 www.pasta.or.jp	15-6 Nihonbashi Kabutocho Chuo-ku, Tokyo 103-0026
All Japan Spices Assoc.	Tel: 81(0)3-3940-2791 Fax: 81(0)3-3940-2790 www.ansa-spice.com	2-13-1 Nishigahara Kita-ku, Tokyo 114-0024
Chocolate & Cocoa Assoc. of Japan	Tel: 81(0)3-5777-2035 Fax: 81(0)3-3432-8852 www.chocolate-cocoa.com	JB Bldg., 6-9-5 Shimbashi Minato-ku, Tokyo 105-0004
Japan Baking Industry Assoc.	Tel: 81(0)3-3667-1976 Fax: 81(0)3-3667-2049 www.fsic.co.jp/food/pan	15-6 Nihonbashi Kabutocho Chuo-ku, Tokyo 103-0026
Japan Bento Manufacturers Assoc.	Tel: 81(0)3-3356-1575 Fax: 81(0)3-3356-1817 www.bentou-shinkou.or.jp	Shinichi Bldg. 10F, 2-8 Yotsuya Shinjuku-ku, Tokyo 160-0004
Japan Canners Assoc.	Tel: 81(0)3-3213-4751 Fax: 81(0)3-3211-1430 www.jca-can.or.jp	Yurakucho Denki Bldg, 1-7-1 Yurakucho Chiyoda-ku, Tokyo 100-0006
Japan Cheese Promotion Council	Tel: 81(0)3-3264-4133 Fax: 81(0)3-3264-4139 www.cheesefesta.com	1-14-7 Kudan Kita Chiyoda-ku, Tokyo 102-0073
Japan Dairy Industry Assoc.	Tel: 81(0)3-3261-9161 Fax: 81(0)3-3261-9175 www.jdia.or.jp	1-14-19 Kudan Kita Chiyoda-ku, Tokyo 102-0073
Japan Delica Foods Manufacturers Assoc.	Tel: 81(0)3-3263-0957 Fax: 81(0)3-3263-1325 www.souzai.or.jp	Noda Bldg. 302, 10-6 Ichibancho Chiyoda-ku, Tokyo 102-0082
Japan Dry Fruits Importers Assoc.	Tel: 81(0)3-3253-1234 Fax: 81(0)3-5256-1914 (n.a.)	c/o Shoei Foods Corp. 5-7 Akihabara, Taito-ku, Tokyo 110-0066

Japan Freeze Dry Food Industry Assoc.	Tel: 81(0)3-3432-4664 Fax: 81(0)3-3459-4654 (n.a.)	c/o Nihon Shokuryo Shimbun 1-9-9 Yaesu, Chuo-ku, Tokyo 103-0028
Japan Frozen Foods Assoc.	Tel: 81(0)3-3667-6671 Fax: 81(0)3-3669-2117 www.reishokukyo.or.jp	10-6 Nihonbashi -Kobunacho Chuo-ku, Tokyo 103-0024
Japan Grain Importers Assoc.	Tel: 81(0)3-3274-0172 Fax: 81(0)3-3274-0177 (n.a.)	Mizuho Kaikan, 2-1-16 Nihonbashi Chuo-ku, Tokyo 103-0027
Japan Ham & Sausage Processors Assoc.	Tel: 81(0)3-3444-1211 Fax: 81(0)3-3441-8287 http://group.lin.go.jp/hamukumi/	1-5-6 Ebisu Shibuya-ku, Tokyo 150-0013
Japan Health Food Assoc.	Tel: 81(0)3-3268-3134 Fax: 81(0)3-3268-3136 www.health-station.com/jhnfa	2-7-27 Ichigaya Sadoharacho Shinjuku-ku, Tokyo 162-0842
Japan Honey Assoc.	Tel: 81(0)3-3297-5645 Fax: 81(0)3-3297-5646 http://group.lin.go.jp/bee/	Bajichikusan Kaikan, 2-6-16-Shinkawa, Chuo-ku Tokyo 104-0033
Japan Ice Cream Assoc.	Tel: 81(0)3-3264-3104 Fax: 81(0)3-3230-1354 www.icecream.or.jp	1-14-19 Kudan Kita Chiyoda-ku, Tokyo 102-0073
Japan Fish Traders Importers Assoc.	Tel: 81(0)3-5280-2891 Fax: 81(0)3-5280-2892 www.jfta-or.jp	1-23 Kanda-Nishikicho, Chiyoda-ku, Tokyo 101-0054
Japan Meat Traders Assoc.	Tel: 81(0)3-3588-1665 Fax: 81(0)3-3588-0013 (n.a.)	Daini Watanabe Bldg., 1-7-3 Higashi Azabu Minato-ku, Tokyo 106-0044
Japan Potato Chips Manufacturers Assoc.	Tel: 81(0)3-3902-8877 Fax: 81(0)3-3902-9131 (n.a.)	c/o Calbee, 1-20-1 Akabane Minami Kita-ku, Tokyo 115-0044
Japan Processed Tomato Industry Assoc.	Tel: 81(0)3-3639-9666 Fax: 81(0)3-3639-9669 www.japan-tomato.or.jp	15-18 Nihonbashi- Kodenmacho Chuo-ku, Tokyo 103-0001
Japan Sauce Industry Assoc.	Tel: 81(0)3-3639-9667 Fax: 81(0)3-3639-9669 www.nippon-sauce.or.jp	15-18 Nihonbashi- Kodenmacho Chuo-ku, Tokyo 103-0001
Japan Soba Noodle Assoc.	Tel: 81(0)3-3264-3801 Fax: 81(0)3-3264-3802 (n.a.)	2-4 Kanda Jinbocho Chiyoda-ku, Tokyo 101-8420
School Meal Manufacturers Assoc.	Tel: 81(0)3-3486-3256 Fax: 81(0)3-3498-1346 (n.a.)	c/o Q.P, 1-4-13 Shibuya Shibuya-ku, Tokyo 150-0002

Table D-7: Japanese Associations - Beverages

Organization Name	Telephone/Fax URL	Address
All Japan Coffee Assoc.	Tel: 81(0)3-5649-8377 Fax: 81(0)3-5649-8388 http://coffee.ajca.or.jp	Max Bldg., 6-2 Nihonbashi Hakozakicho Chuo-ku, Tokyo 103-0015
Brewers Association of Japan	Tel: 81(0)3-3561-8386 Fax: 81(0)3-3561-8380 www.brewers.or.jp	Showa Bldg., 2-8-18 Kyobashi Chuo-ku, Tokyo 104-0031
The Mineral Water Assoc. of Japan	Tel: 81(0)3-3350-9100 Fax: 81(0)3-3350-7960 www.minekyo.jp	Fujiwara Bldg. 5F, 2-9-17 Shinjuku-ku, Shinjuku, Tokyo 160-0022
Japan Soft Drinks Assoc.	Tel: 81(0)3-3270-7300 Fax: 81(0)3-3270-7306 www.j-sda.or.jp	3-3-3 Nihonbashi- Muromachi Chuo-ku, Tokyo 103-0022
Japan Spirits & Liquors Makers Assoc.	Tel: 81(0)3-6202-5728 Fax: 81(0)3-6202-5738 www.winery.or.jp	2-12-7, Nihonbashi Chuo-ku, Tokyo 103-0025
Japan Wine & Spirit Importers Assoc.	Tel: 81(0)3-3503-6505 Fax: 81(0)3-3503-6504 (n.a.)	1-13-5 Toranomon Minato-ku, Tokyo 105-0001

Table D-8: Japanese Associations - Distribution

Organization Name	Telephone/Fax URL	Address
All Japan Supermarket Assoc.	Tel: 81(0)3-3207-3157 Fax: 81(0)3-3207-5277 www.super.or.jp	Okubo Fuji Bldg., 2-7-1 Okubo Shinjuku-ku, Tokyo 169-0072
Japan Chain Store Assoc.	Tel: 81(0)3-5251-4600 Fax: 81(0)3-5251-4601 www.jcsa.gr.jp	1-21-17 Toranomon Minato-ku, Tokyo 105-0001
Japan Department Store Assoc.	Tel: 81(0)3-3272-1666 Fax: 81(0)3-3281-0381 www.depart.or.jp	Yanagiya Bldg. 7F, 2-1-10 Nihonbashi Chuo-ku, Tokyo 103-0027
Japan Food Service Assoc.	Tel: 81(0)3-5403-1060 Fax: 81(0)3-5403-1065 www.jfnet.or.jp	1-29-6 Hamamatsucho Minato-ku, Tokyo 105-0013
Japan Food Service Wholesalers Assoc.	Tel: 81(0)3-5296-7723 Fax: 81(0)3-3258-6367 www.gaishokukyo.or.jp	2-16-18 Uchikanda Chiyoda-ku, Tokyo 101-0047
Japan Franchise Chain Assoc.	Tel: 81(0)3-5777-8701 Fax: 81(0)3-5777-8711 http://jfa.jfa-fc.or.jp/	Daini Akiyama Bldg., 3-6-2 Toranomon Minato-ku, Tokyo 105-0001
Japan Hotel Assoc.	Tel: 81(0)3-3279-2706 Fax: 81(0)3-3274-5375 www.j-hotel.or.jp	Shin Otemachi Bldg., 2-2-1 Otemachi Chiyoda-ku, Tokyo 100-0004
Japan Medical Food Service Assoc.	Tel: 81(0)3-3595-4281 Fax: 81(0)3-3595-4282 www.j-mk.or.jp	Araki Bldg. 2F, 1-5-7 Nagatacho Chiyoda-ku, Tokyo 100-0014
Japan Processed Foods Wholesalers Assoc.	Tel: 81(0)3-3241-6568 Fax: 81(0)3-3241-1469 (n.a.)	Edo Bldg., 2-5-11 Nihonbashi- Muromachi Chuo-ku, Tokyo 102-0022
Japan Restaurant Assoc.	Tel: 81(0)3-3571-2438 Fax: 81(0)3-3571-7090 www.joy.ne.jp/restaurant	8-10-8 Ginza Chuo-ku, Tokyo 104-0061
Japan Retailers Assoc.	Tel: 81(0)3-3283-7920 Fax: 81(0)3-3215-7698 www.japan-retail.or.jp	3-2-2 Marunouchi Chiyoda-ku, Tokyo 100-0005
Japan Self-Service Assoc.	Tel: 81(0)3-3255-4825 Fax: 81(0)3255-4826 http://www.jssa.or.jp/	Sakurai bldg. 3-19-8, Uchikanda, Chiyoda-ku Tokyo, 101-0047

*In all cases above in these appendices, dial the ‘0’ when in Japan.

Sector Reports and Further Information

The following homepages and reports can provide useful information to interested exporters.

Agricultural Trade Office's homepages
http://www.atojapan.org (English)
http://www.greatamericanfood.imfo (Japanese)

Food Processing Sector Report
A detailed look at Japan's food processing sector, identifying key trends and leading Japanese manufacturers.
http://www.fas.usda.gov/gainfiles/200504/146119454.pdf

HRI Food Service Sector Report
A guide to Japan's nearly $245 billion Food service market.
http://www.fas.usda.gov/gainfiles/200503/146118963.pdf

Food and Agricultural Import Regulations and Standards (FAIRS) Report
The FAIRS report is a comprehensive guide to Japan's food and beverage regulations, standards and requirements for importation.
http://www.fas.usda.gov/gainfiles/200508/146130440.pdf

Procedures for Importing Foods and Related Products into Japan under the Food Sanitation Law
JETRO report summarizing specific technical import procedures for food products.
http://www.jetro.go.jp/se/e/standards_regulation/shokuhinyunyu-e.pdf

Red Meat Export Requirements for Japan
USDA Food Safety and Inspection Service (FSIS) summary of red meat export requirements for Japan.
http://www.fsis.usda.gov/OFO/export/japan.htm

Th*e National Organic Program - Export Arrangement with Japan*
USDA Agricultural Marketing Service useful information on National Organic Program and Export arrangement with Japan. Product & Market Briefs
http://www.ams.usda.gov/nop/NOP/TradeIssues/Japan.html

Japan Wine Market Annual Report
http://www.fas.usda.gov/gainfiles/200601/146176600.pdf
Despite the strong competition among exporters and other alcoholic beverages like shochu, the outlook remains positive for U.S. wine. Key factors include Japan's improving economy, growing interest in New World wines, and continued deregulation of retail liquor licensing.

Pet Food Market Research on the Japanese Market
http://www.fas.usda.gov/gainfiles/200304/145885127.pdf

Japan External Trade Organization (JETRO) Reports – An excellent source for links to other government websites, food sector reports and English translations for the Government of Japan's documents.
http://www.jetro.go.jp/
Most relevant documents are at:
http://www.jetro.go.jp/en/market/regulations/index.html

Food and Agricultural Import Regulations and Standards
Japan, as one of the largest importers of US agricultural biotechnology products from the U.S., has approved 61 biotech events for food, 38 for feed and 50 for planting.
http://www.fas.usda.gov/gainfiles/200508/146130523.pdf

Revised Allergen Labeling Requirements
The allergen labeling required by Japan's Ministry of Health, Labor and Welfare requires foods containing any of the five ingredients known to cause significant allergic reactions; wheat, buckwheat, egg, milk and peanuts, to be labeled mandatory.
http://www.fas.usda.gov/gainfiles/200506/146130065.pdf

Update on Upcoming JAS Law Revision Affecting Certification Bodies
Japan's Ministry of Agriculture Fisheries and Forestry (MAFF) announced some details about the upcoming changes to the JAS Law, which will affect certification bodies for wood and organic products.
http://www.fas.usda.gov/gainfiles/200506/146130023.pdf

Japan Releases Final Draft of Provisional Maximum Residue Limits (MRLs)
Summary of Japan's New Positive List System for Regulation of Agricultural Chemical Residues.
http://www.fas.usda.gov/gainfiles/200602/146176749.pdf

Launch of "myfood" Website (www.myfood.jp)
MyFood Japan, a web portal designed to showcase U.S. food quality, culture, and safety, made its debut May 16, 2005.
http://www.fas.usda.gov/gainfiles/200505/146119684.pdf

Update: Japan's Beef Traceability Law
Full implementation of Japan's traceability law for domestic beef began on December 1, 2004
http://www.fas.usda.gov/gainfiles/200412/146118379.pdf

Other FAS Japan Reports and other information
Other Japan-specific reports are available on the USDA Foreign Agricultural Service Website.
http://www.fas.usda.gov/scriptsw/attacherep/default.asp